



STRATEGIC ENTERPRISE MANAGEMENT BUSINESS PLANNING AND SIMULATION

ANNUAL DETAIL POSITION BUDGETING

COURSE ID: SEM-BPS-ANNL POS



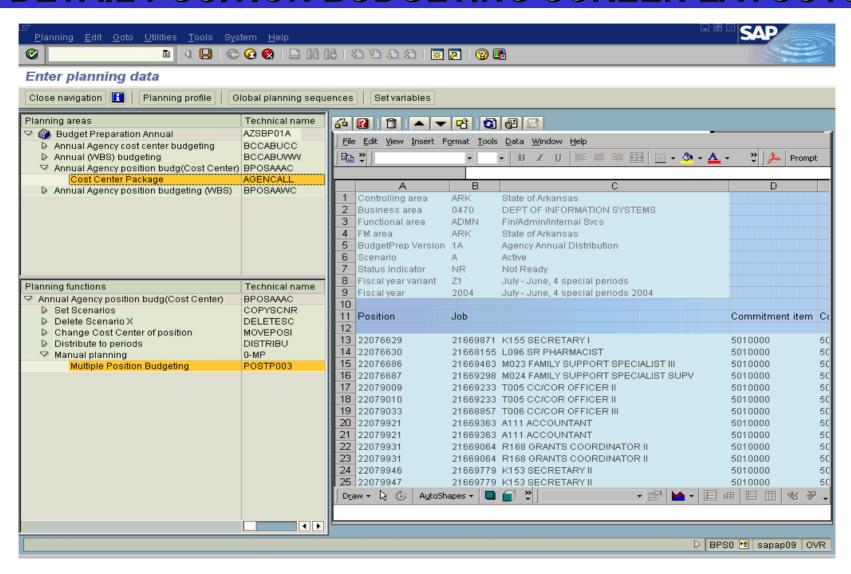
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ANNUAL DETAIL POSITION BUDGETING

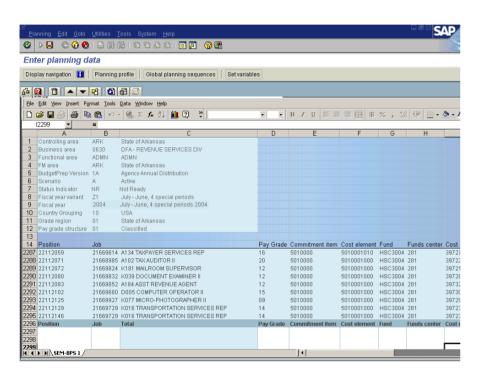


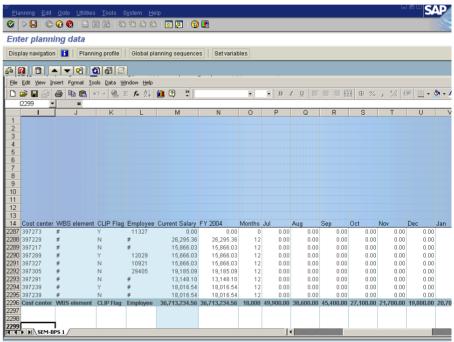
DETAIL POSITION BUDGETING SCREEN LAYOUTS





DETAIL POSITION BUDGETING SCREEN LAYOUTS







BW REPORTS

You can produce a BW Report at the end of each case that will reflect your changes.



CASE 1

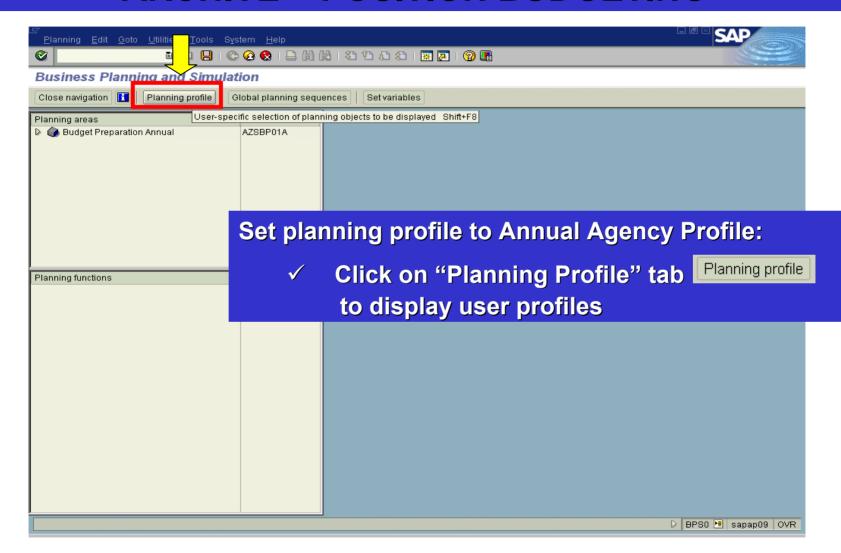
Archive Original Budget



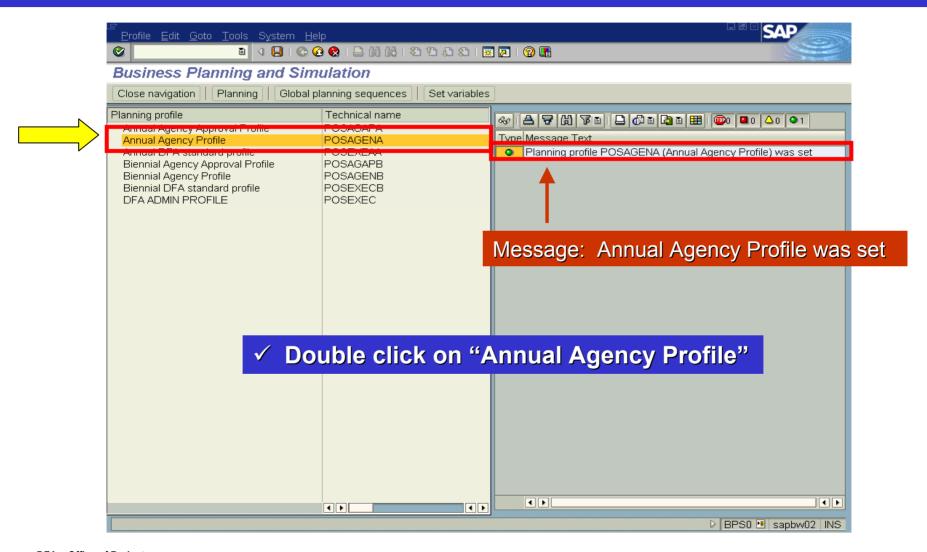
Prior to Agencies making changes to the original individual position budgets, the Active Scenario should be archived in case errors are made. This is accomplished by copying the Active Scenario to Scenario A5.

Position layouts include Extra Help positions as well as Regular positions.

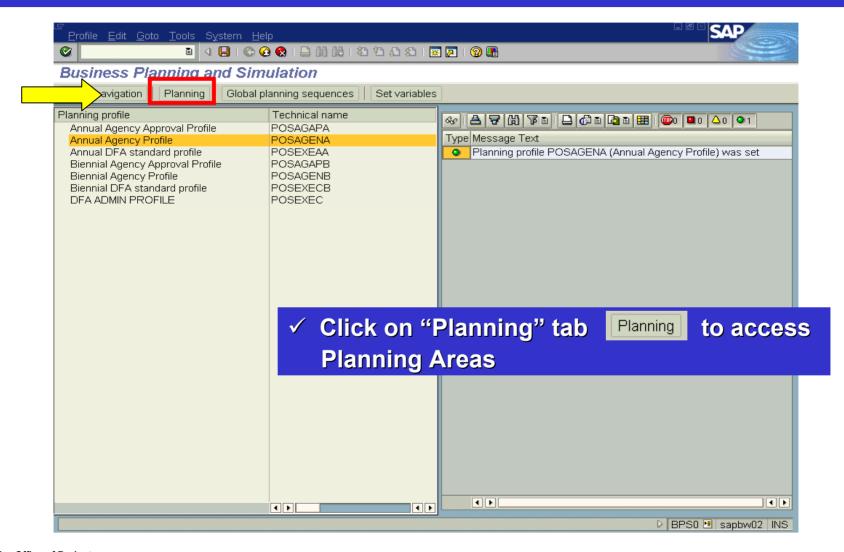




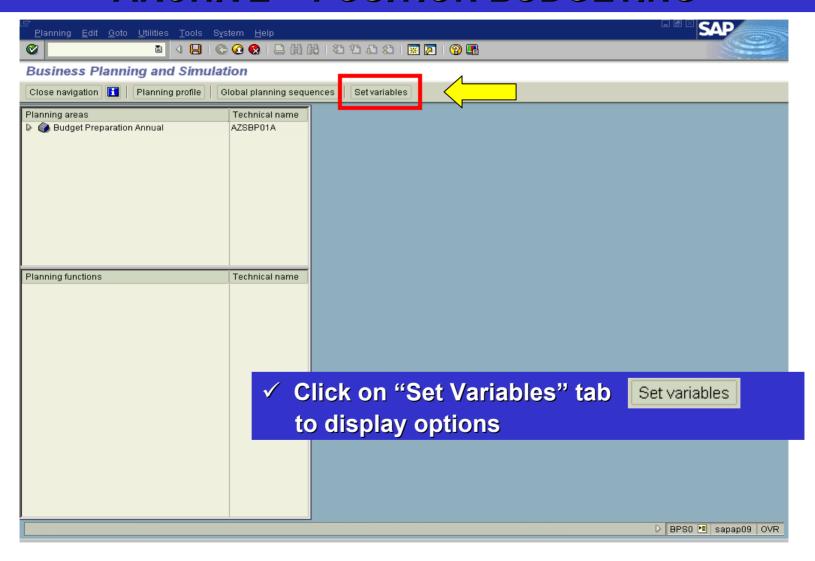




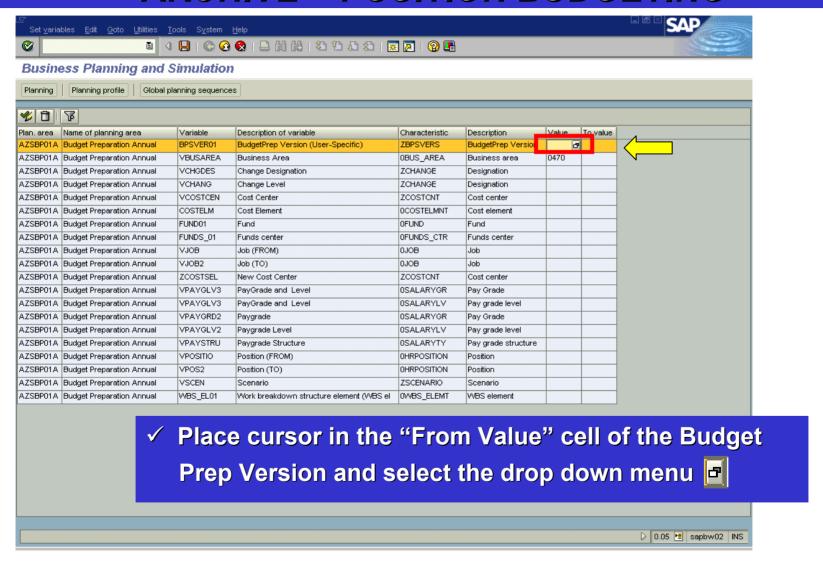




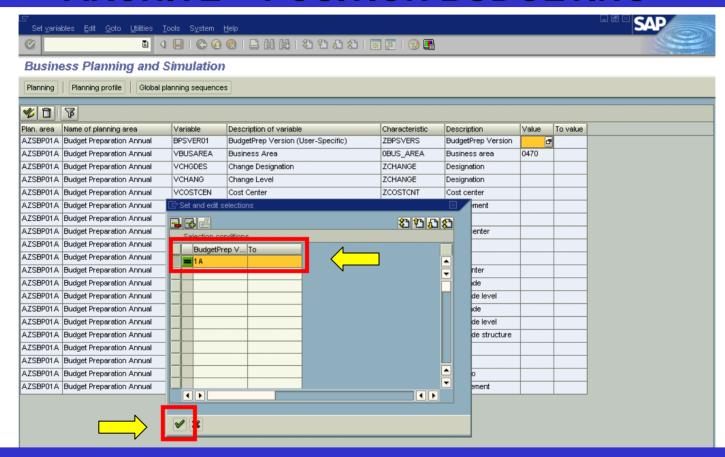








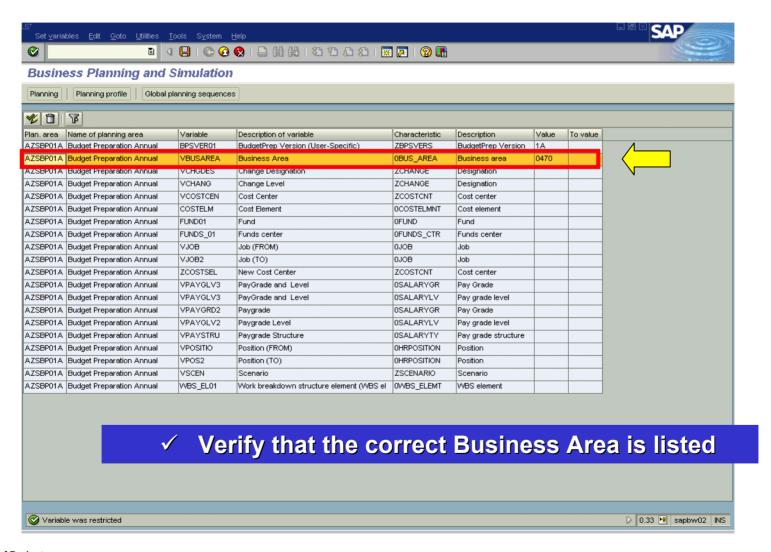




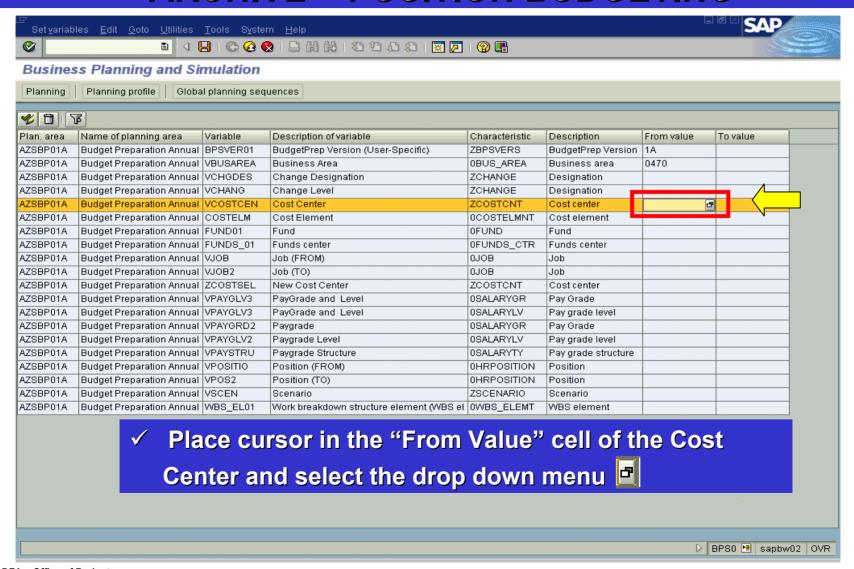
✓ Highlight 1A (Annual Version) and click on green check mark



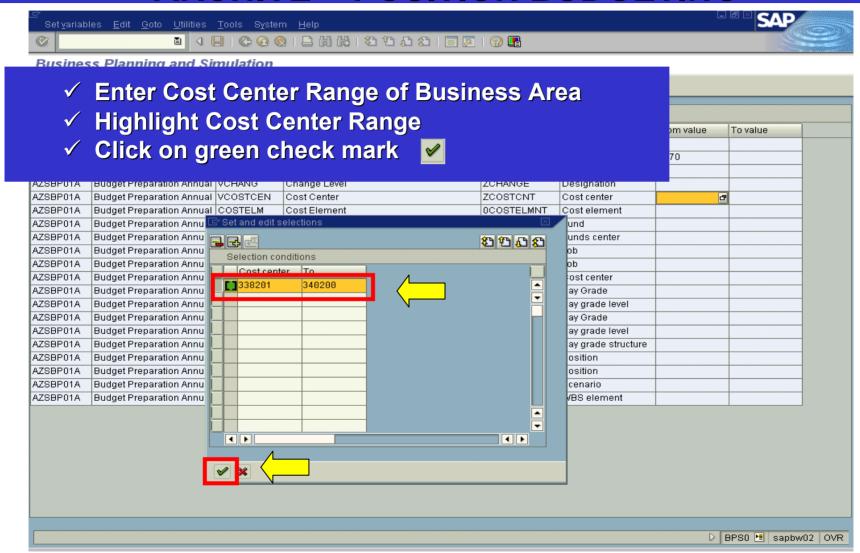




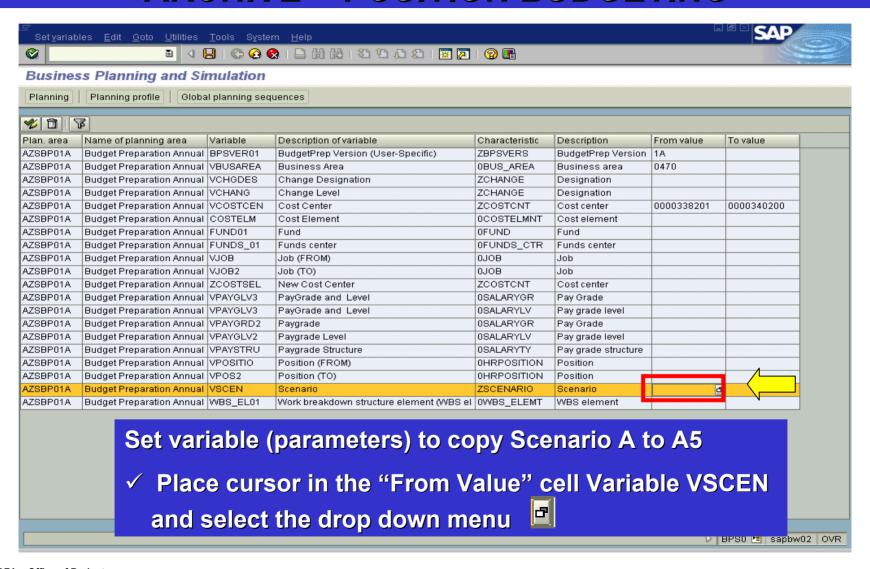




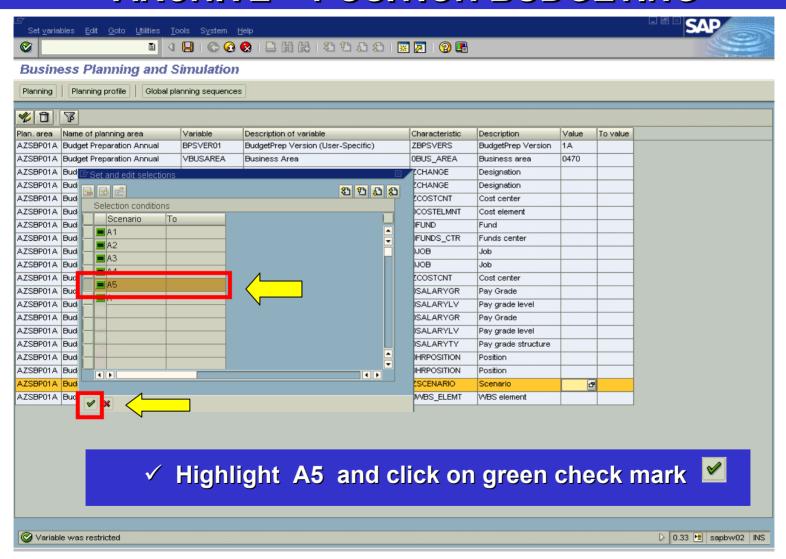




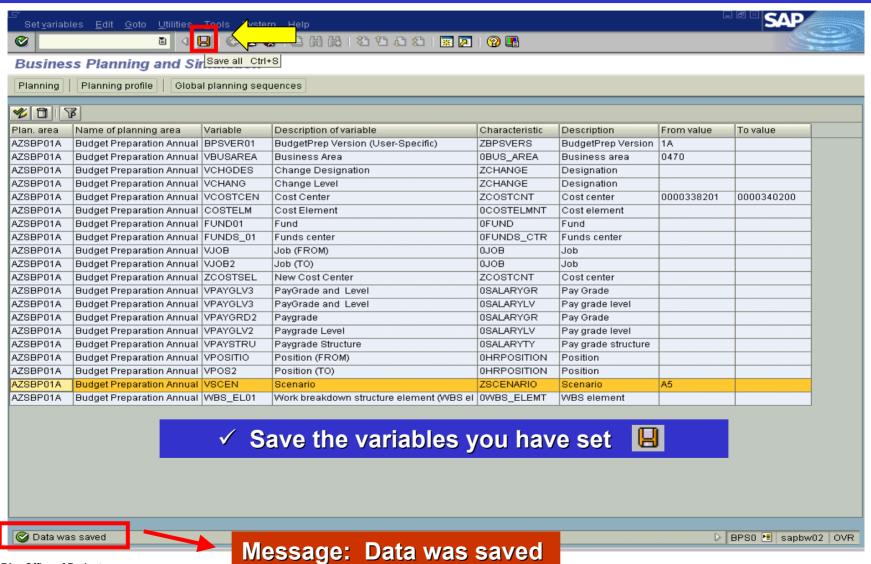




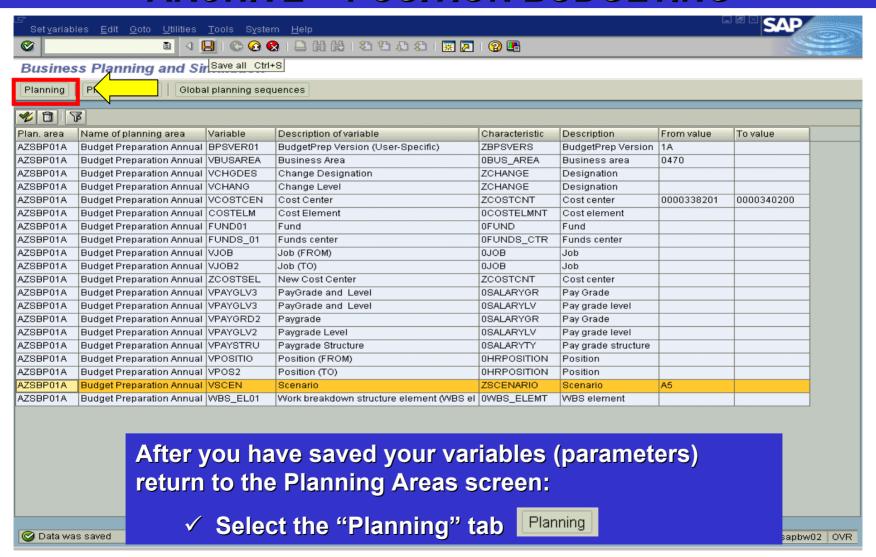




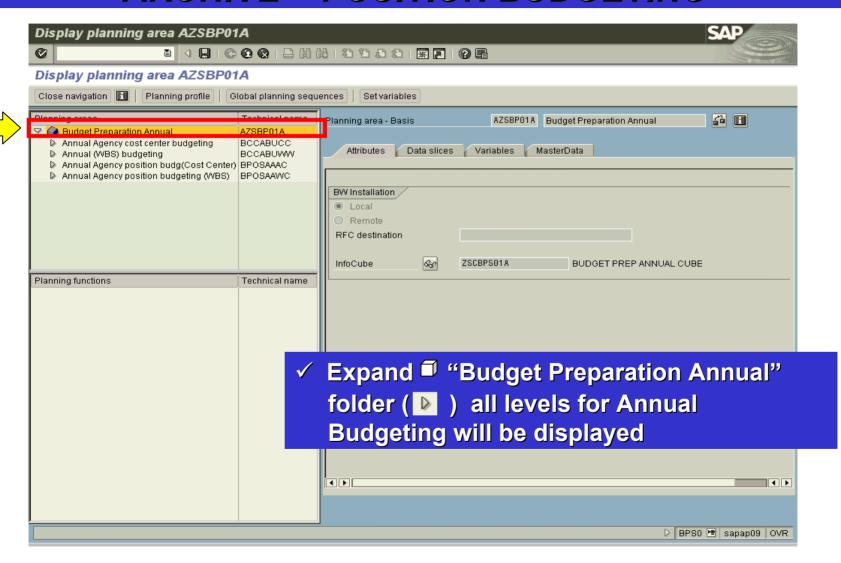




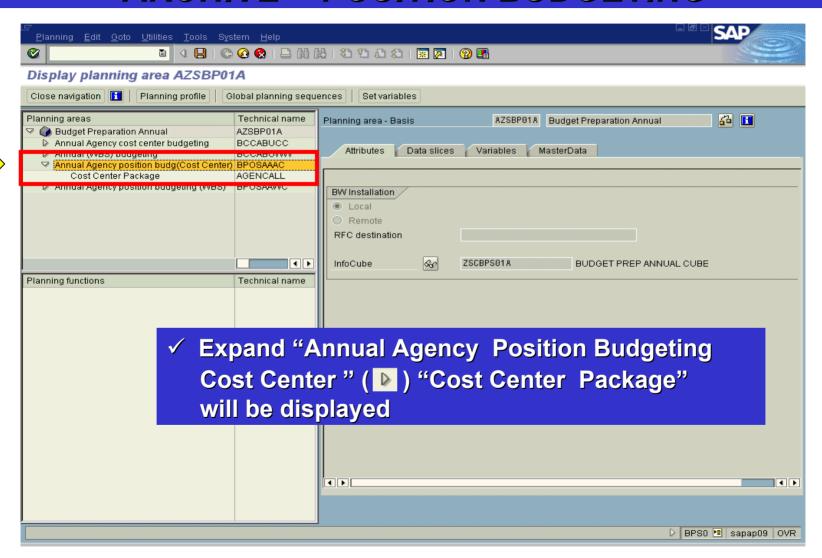




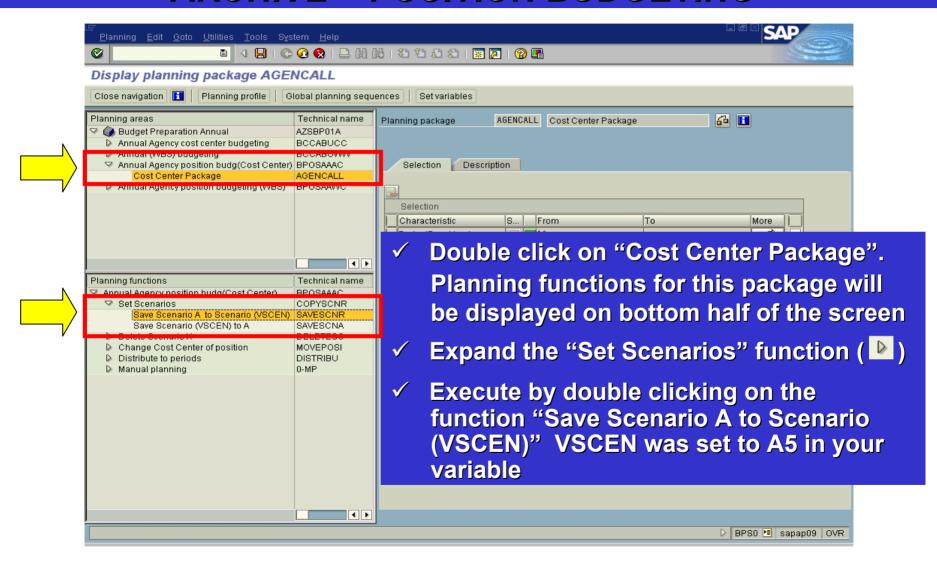




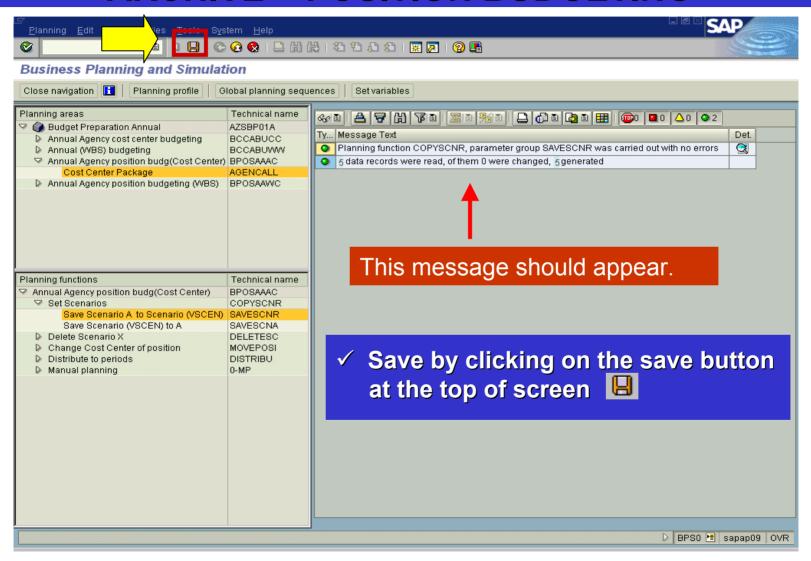




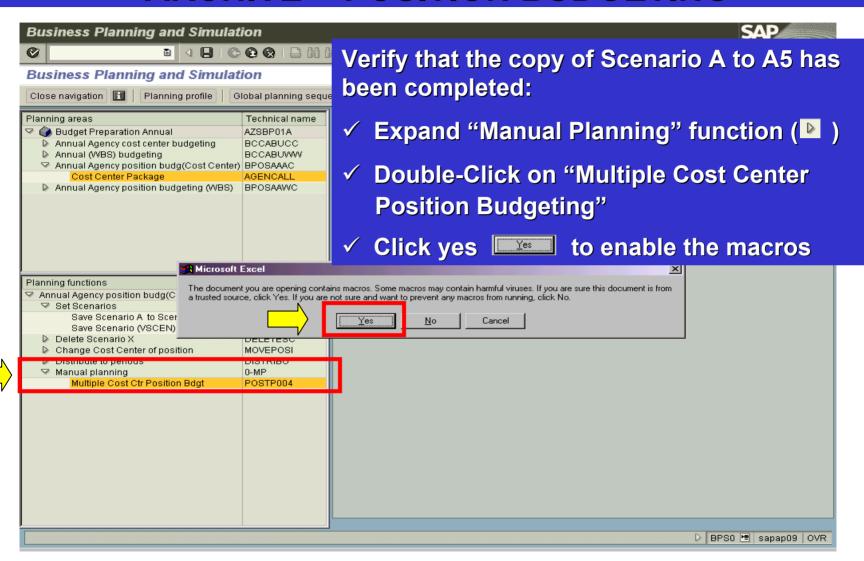




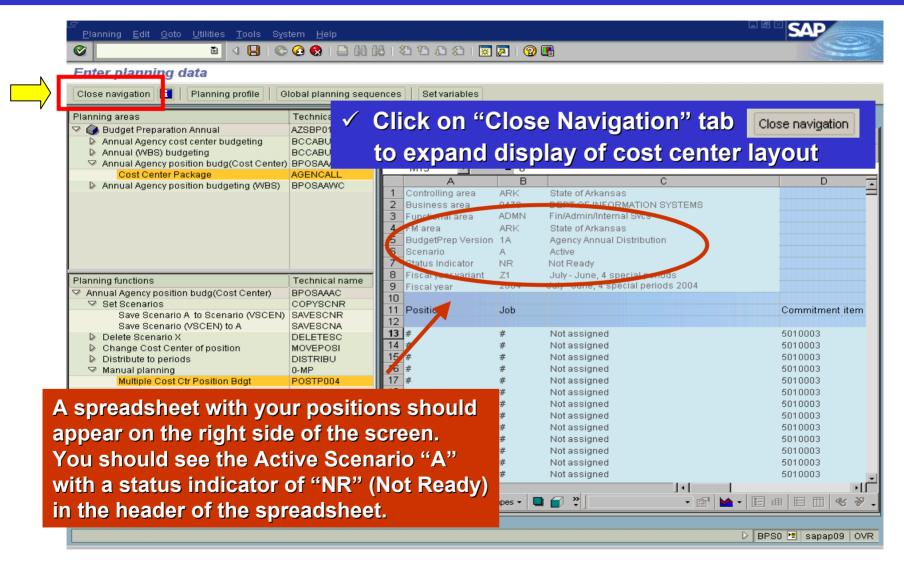




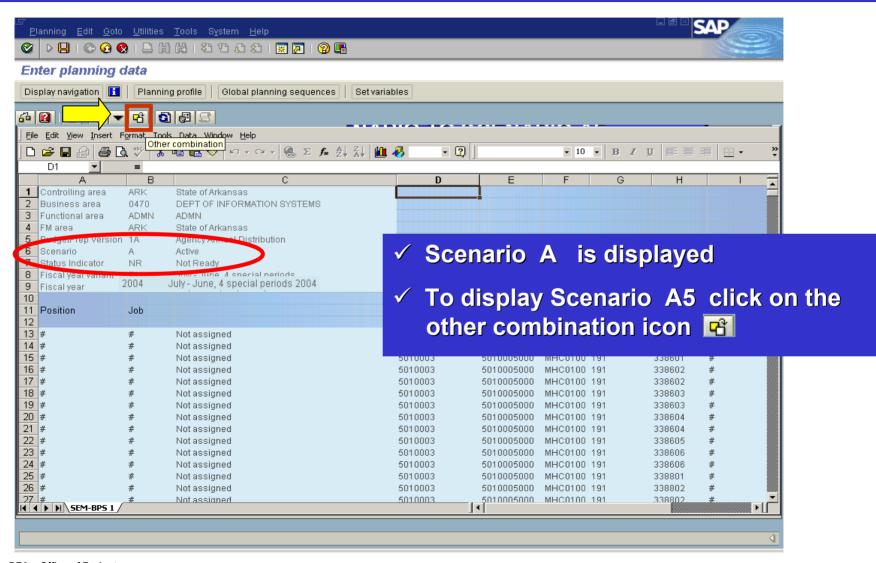




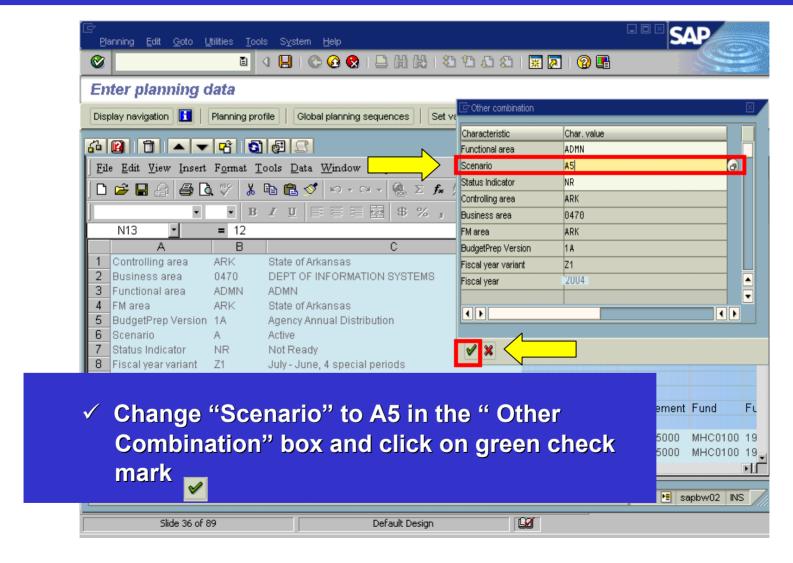




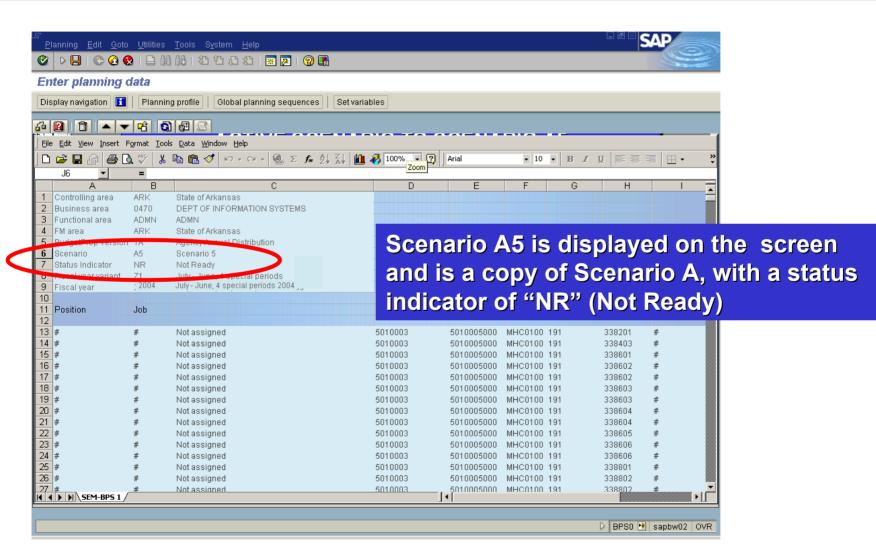






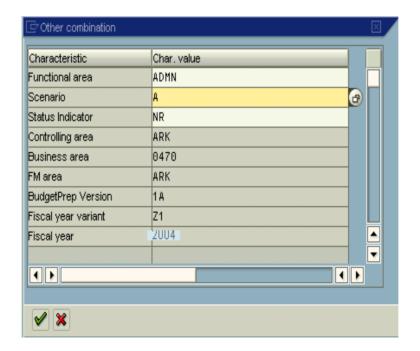








Remember to change back to Scenario "A" before making any changes to the budget. Functions are only applied to the Active "A" Scenario.



CASE 2

Distribute salary amounts to July





FY 2004 salary amounts for each position reflect current salary + cost of living allowance.

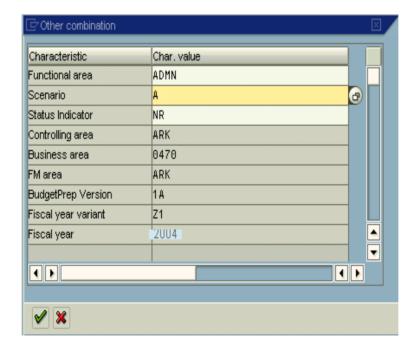
Career Service reflects amount employee receives and is listed below the position on the layout.



Agency can be in either "Annual Agency Approval Profile" or "Annual Agency Profile" when Distributing Salaries.



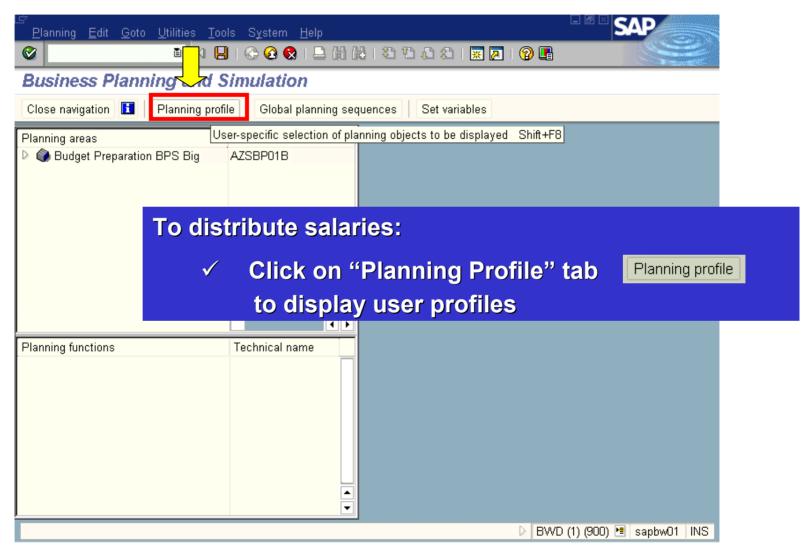
Remember to make sure your are in Scenario "A" before making any changes to the budget. Functions only apply to the Active (A) Scenario.



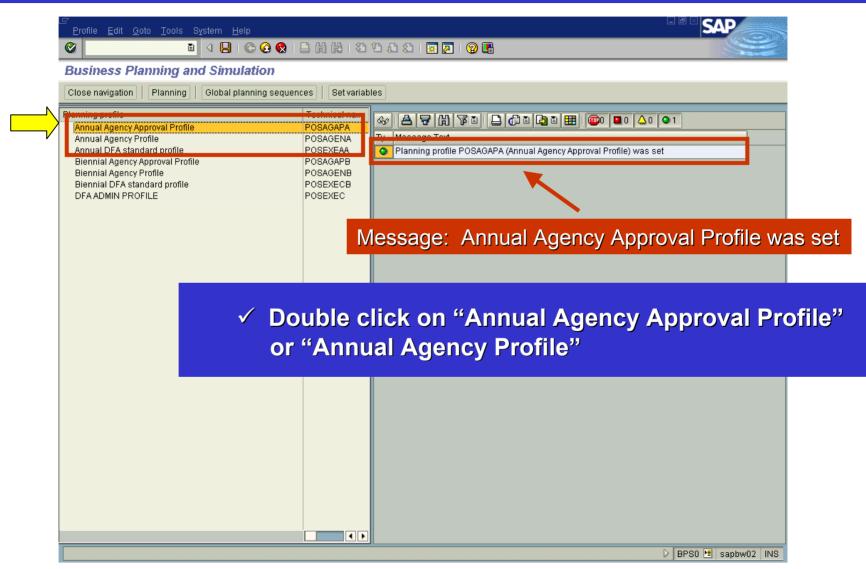


Fringe Benefits will be calculated by your DFA Budget analyst after you have completed all changes on positions. After Fringe Benefits have been calculated for each position, they will appear at the top of the layout. Totals will represent all positions.

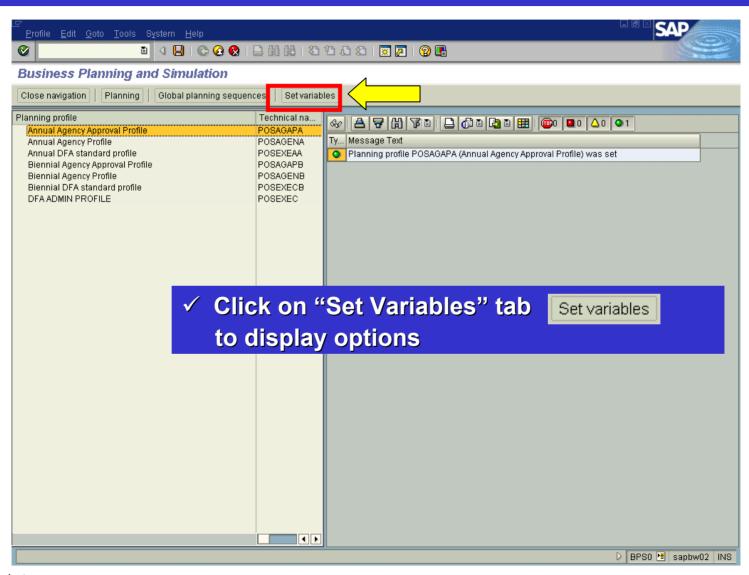




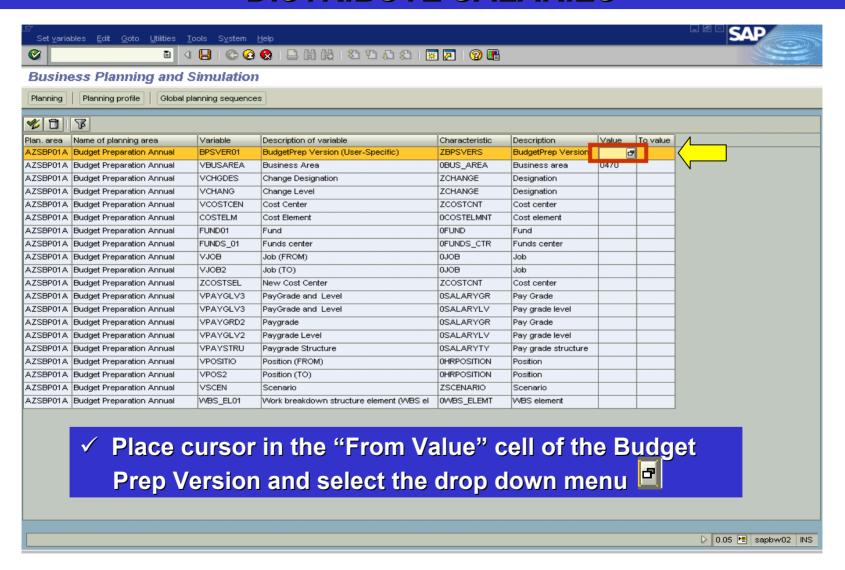




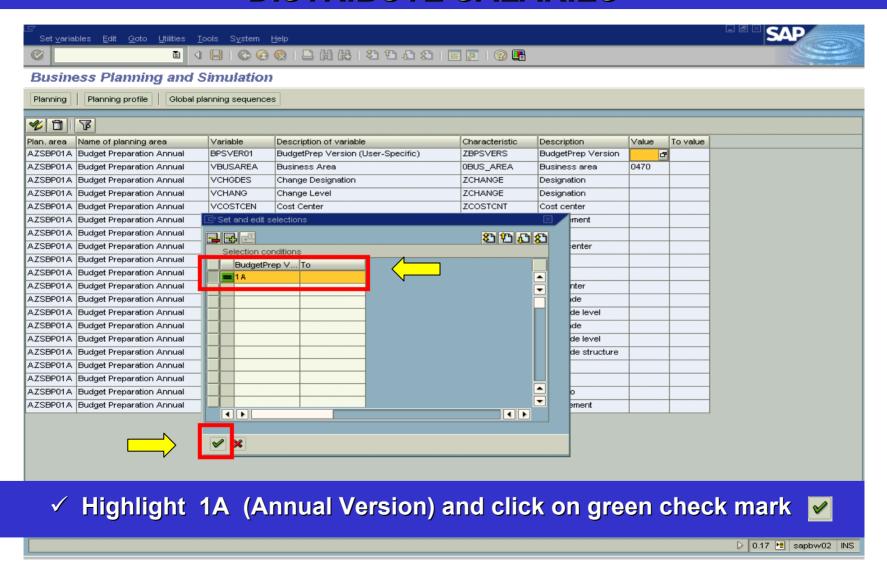




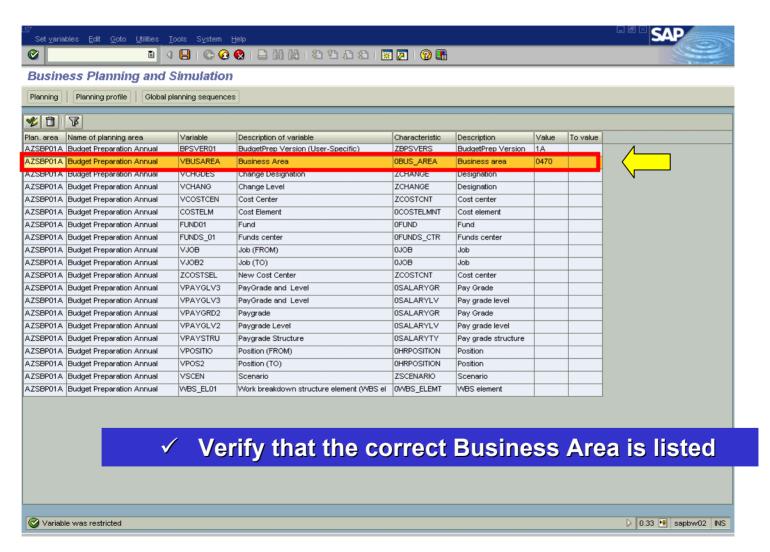




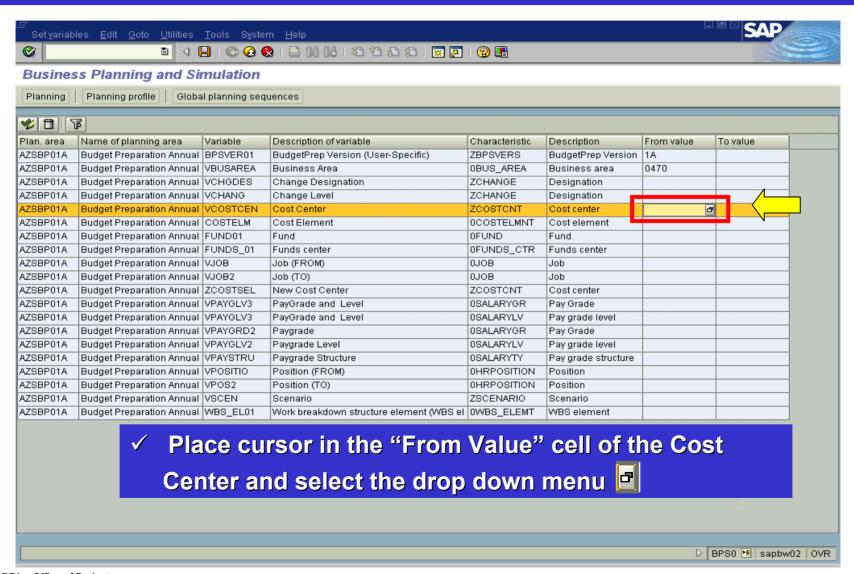




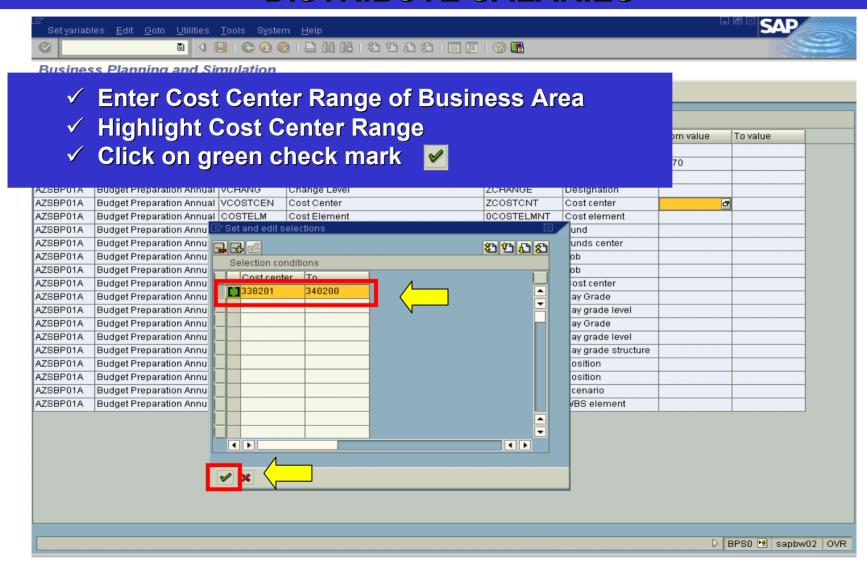




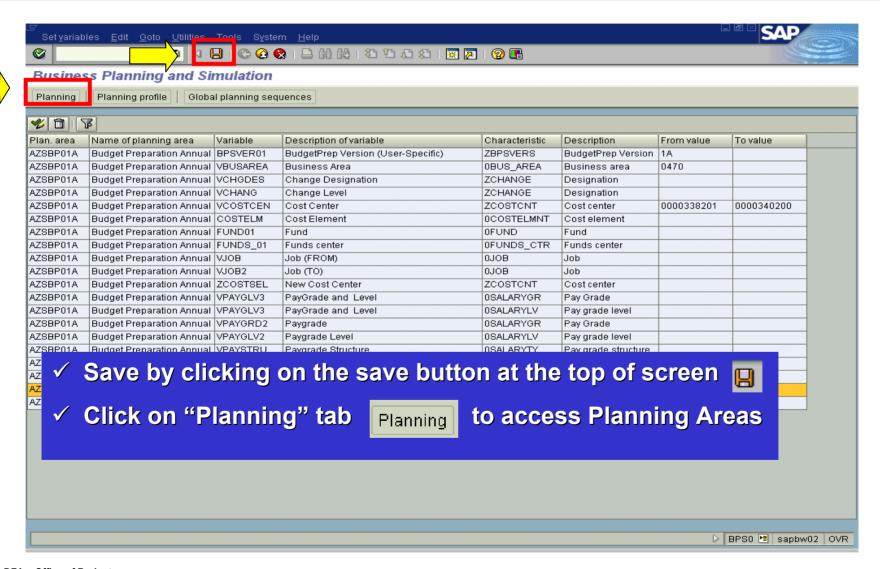




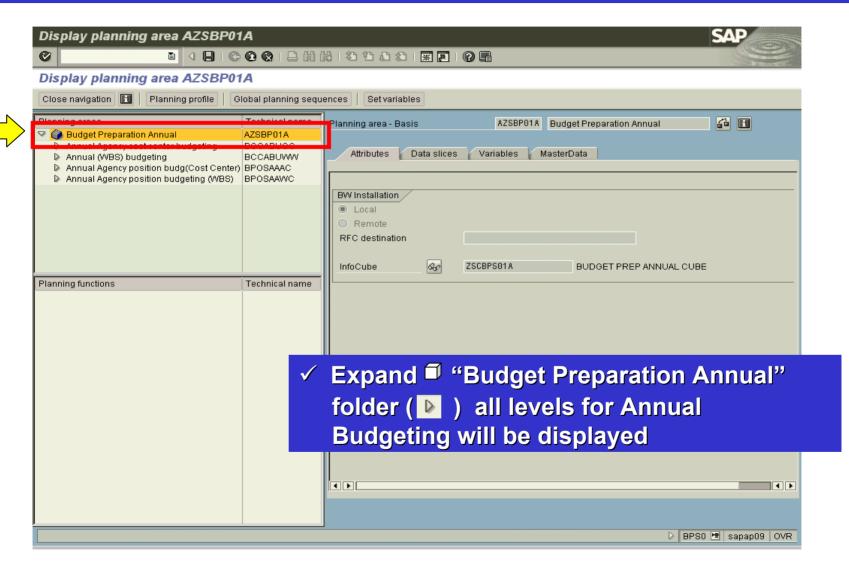




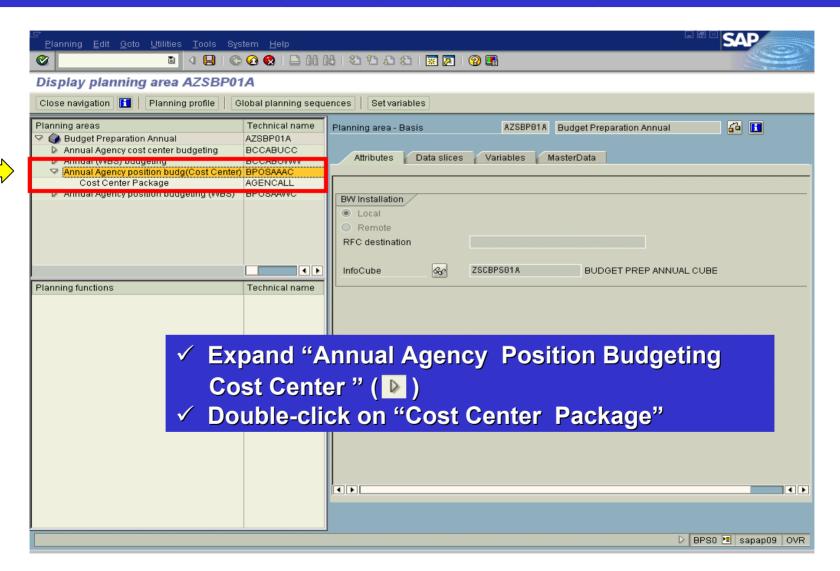




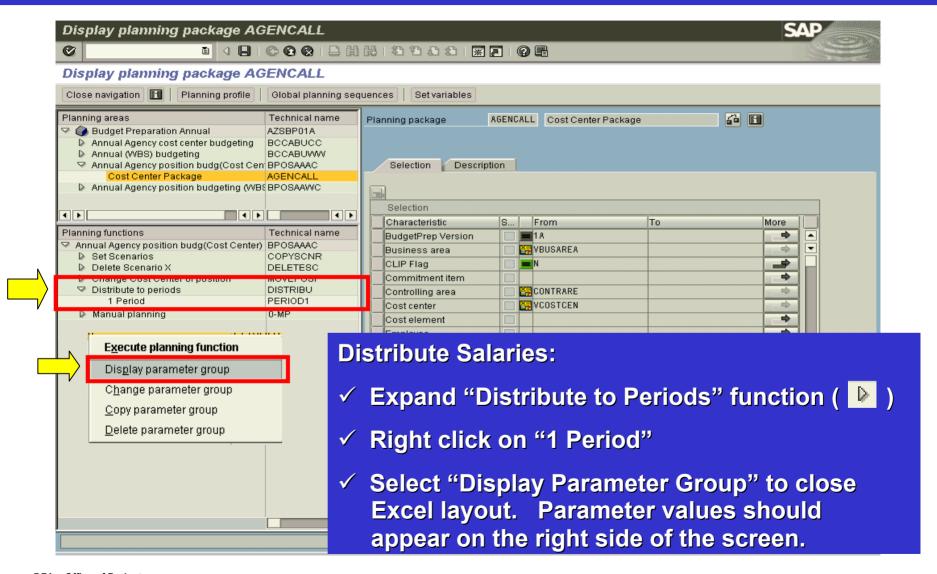




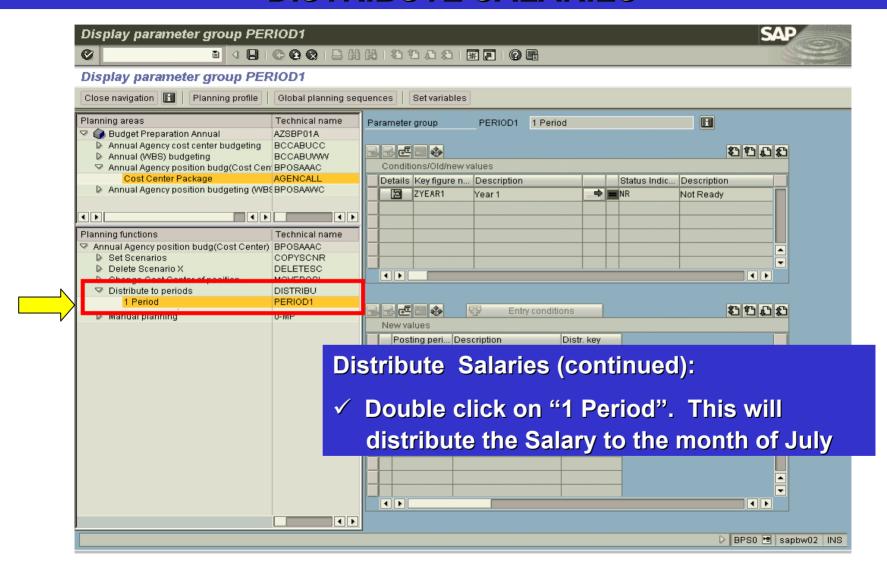




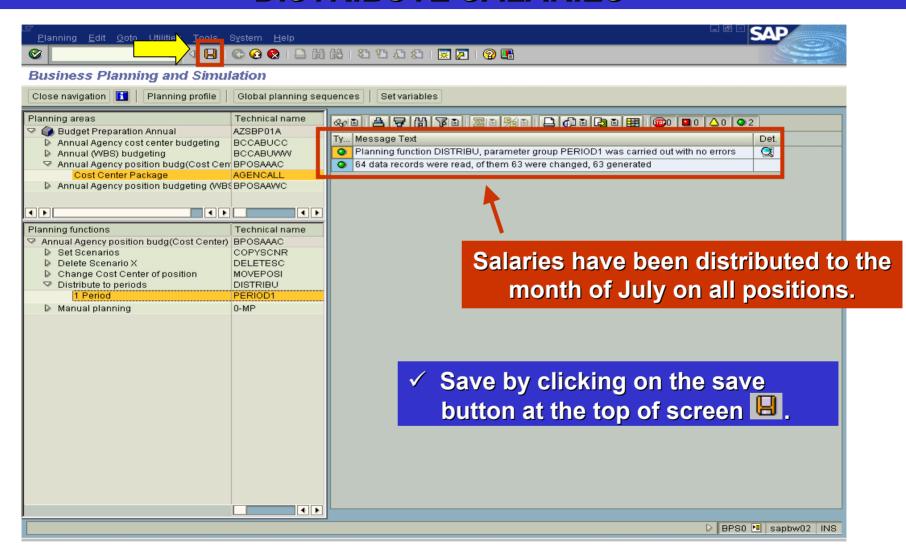








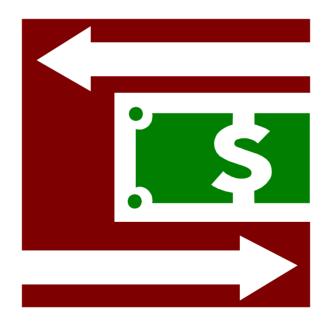




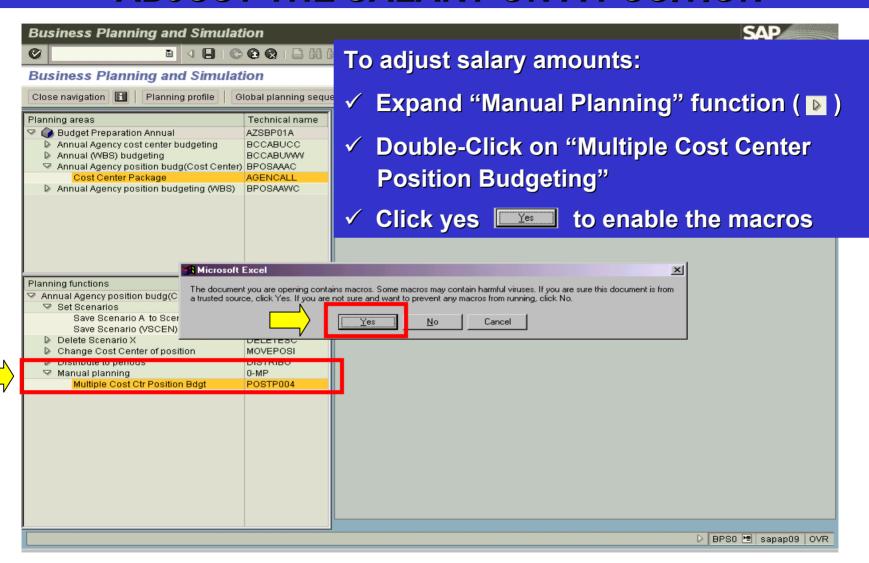


CASE 3

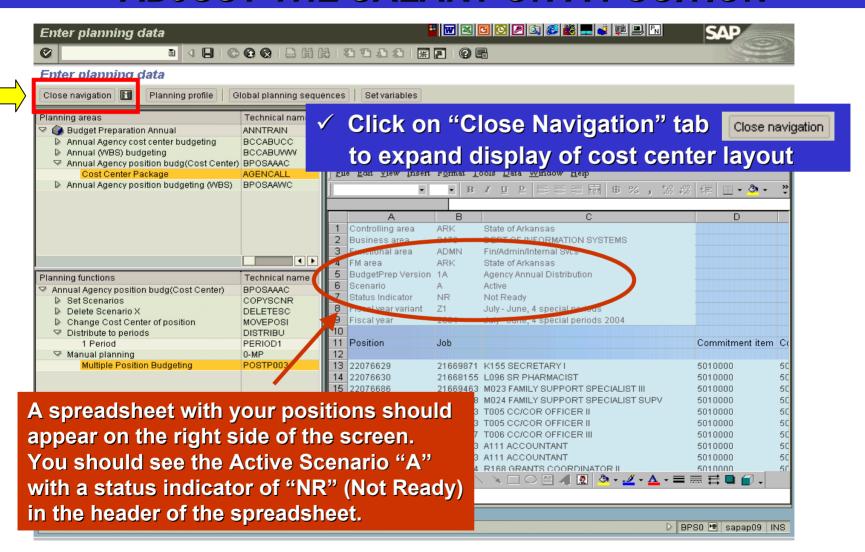
Adjust the salary amount on a position.



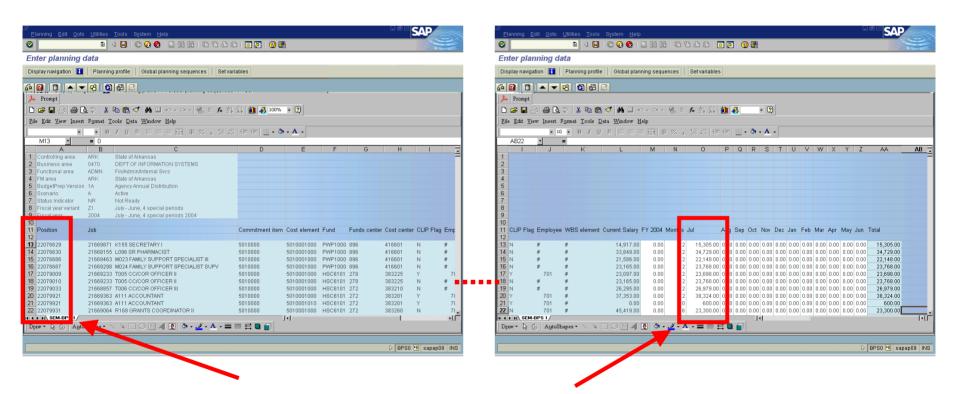




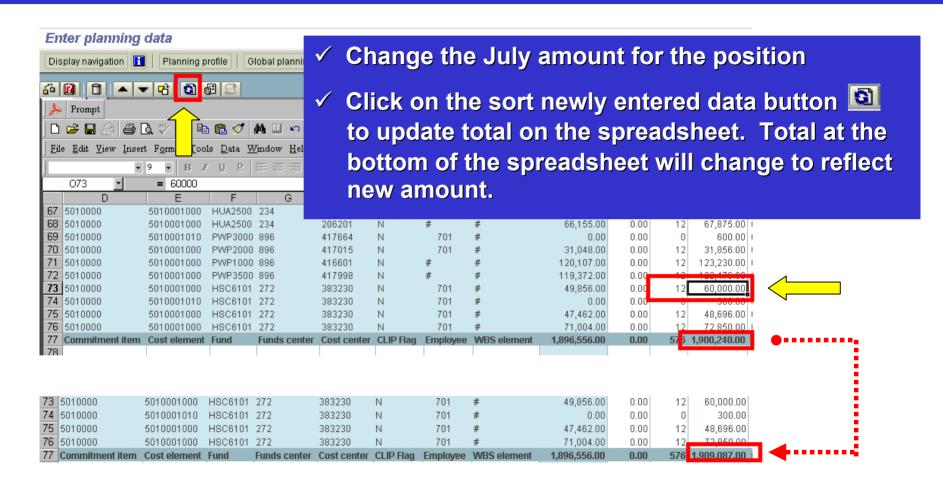




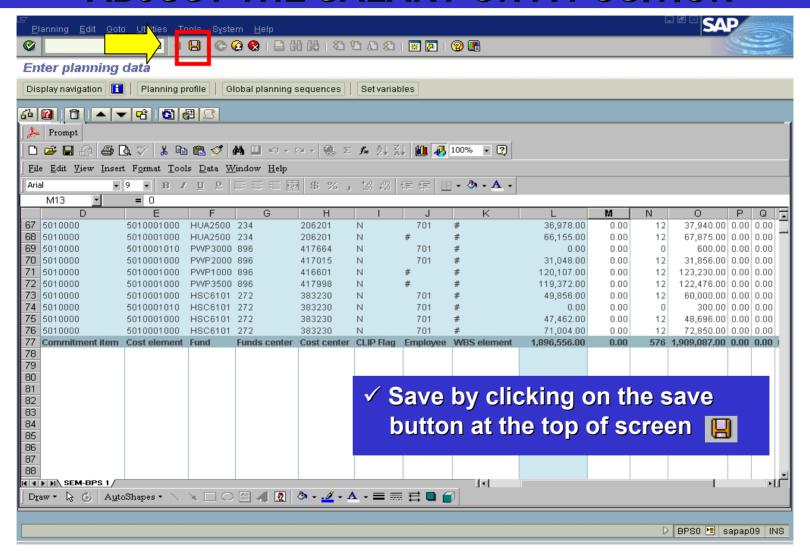




- ✓ Locate position number to be adjusted
- ✓ Locate FY2004 salary amount to be adjusted









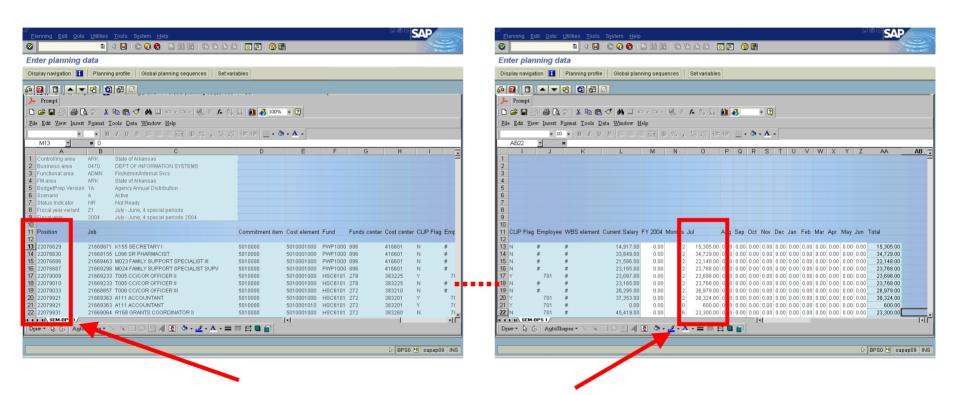
CASE 4

Positions that will not be budgeted in the Fiscal Year.



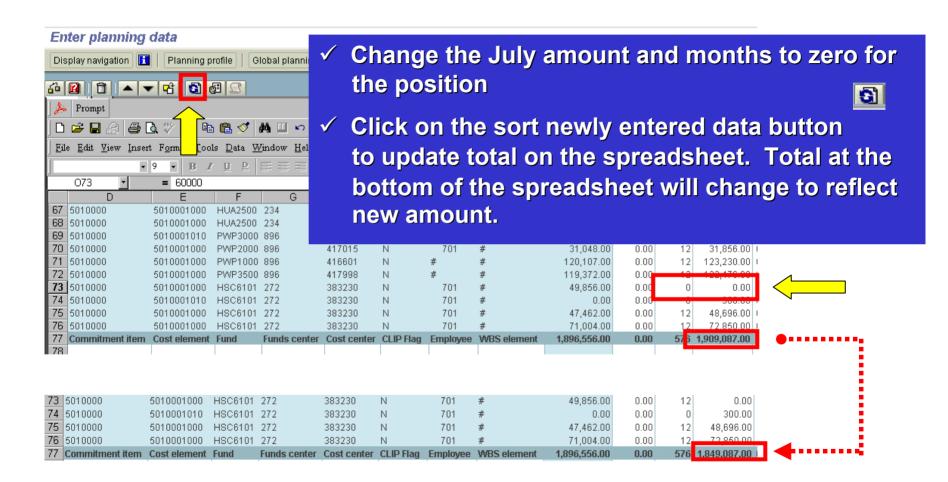


POSITIONS NOT BUDGETED IN A FISCAL YEAR



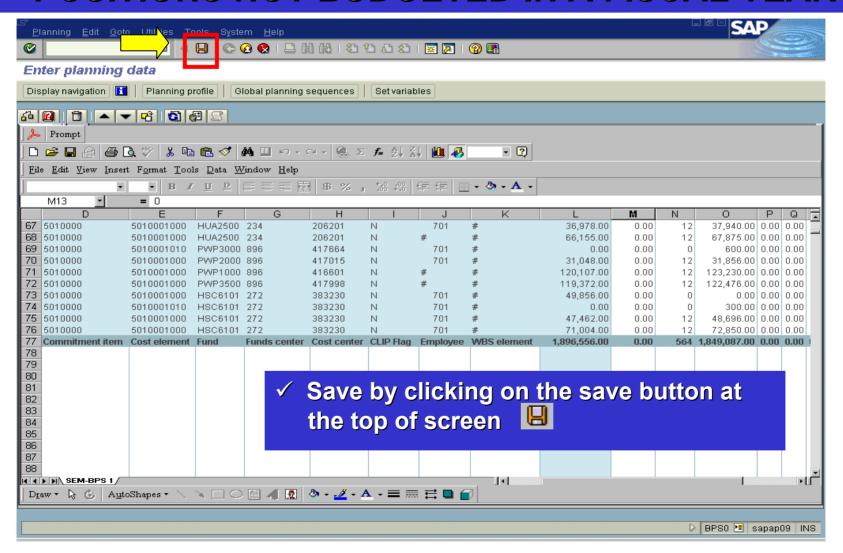
- ✓ Locate position number to be adjusted
- ✓ Locate FY2004 salary amount to be adjusted

POSITIONS NOT BUDGETED IN A FISCAL YEAR





POSITIONS NOT BUDGETED IN A FISCAL YEAR





CASE 5

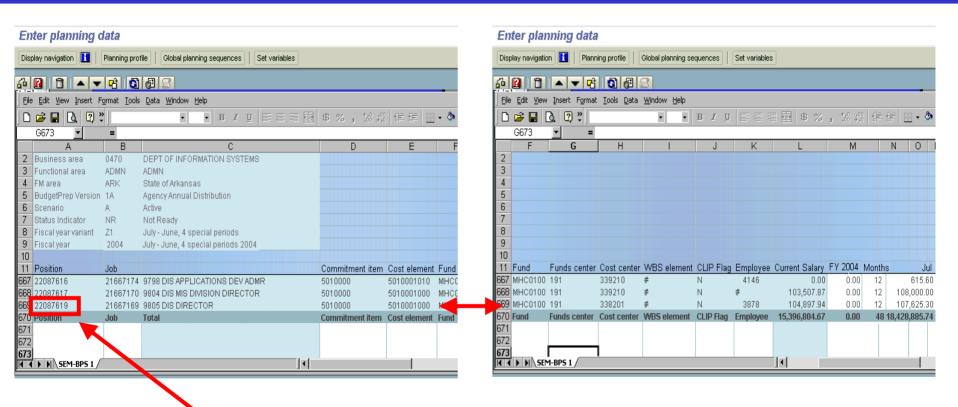
Cost Distribution: Change position budget from one fund/funds center to two (6 months each).





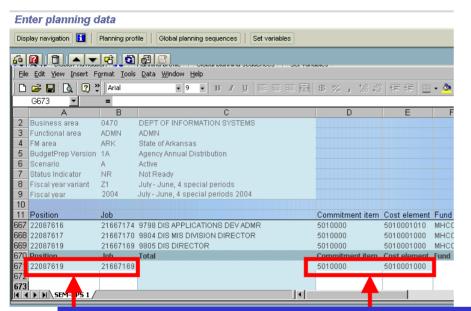
Prior to 1st payroll in FY 04, any changes to position(s) to either add or remove cost distribution will need to be made in HR in R/3 (AASIS) for the change to take effect.

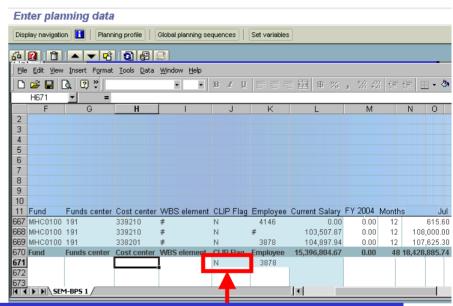




 Locate position number to be distributed to two fund/funds centers

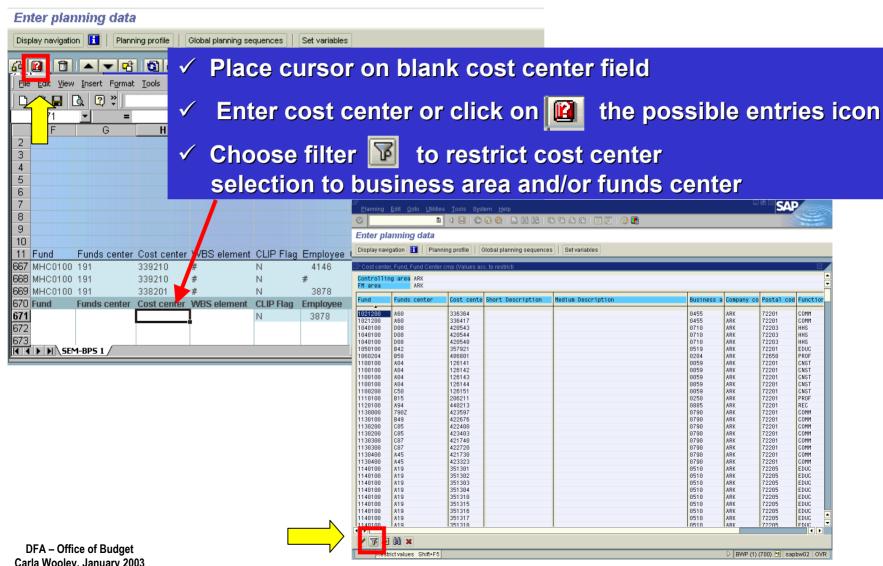




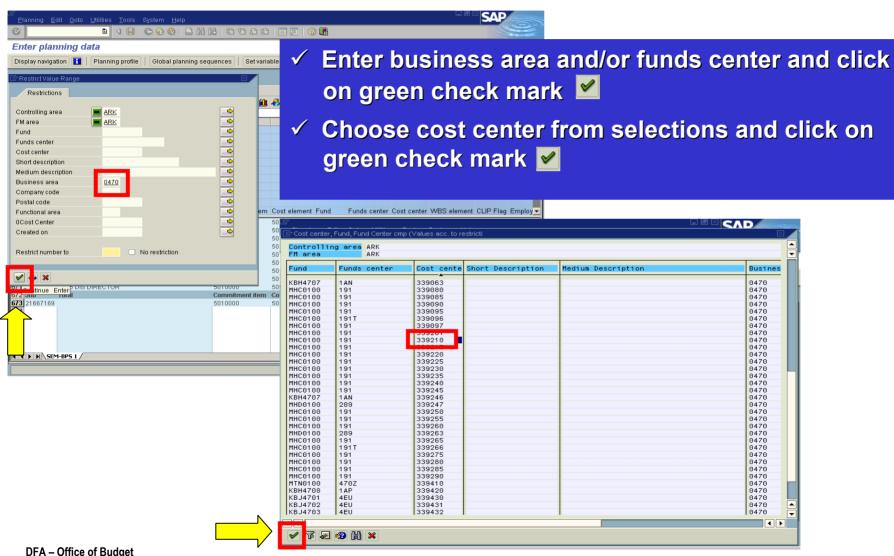


- ✓ Copy protected fields (position/job/commitment item/cost element/ CLIP flag/employee # if a filled position) to unprotected fields at the end of the layout
 - Unprotected fields are the white section at the bottom of the layout
 - Place cursor on field to be copied and press "Ctrl C" on your keyboard, then place cursor in the field you want to insert the copied field and press "Ctrl V"

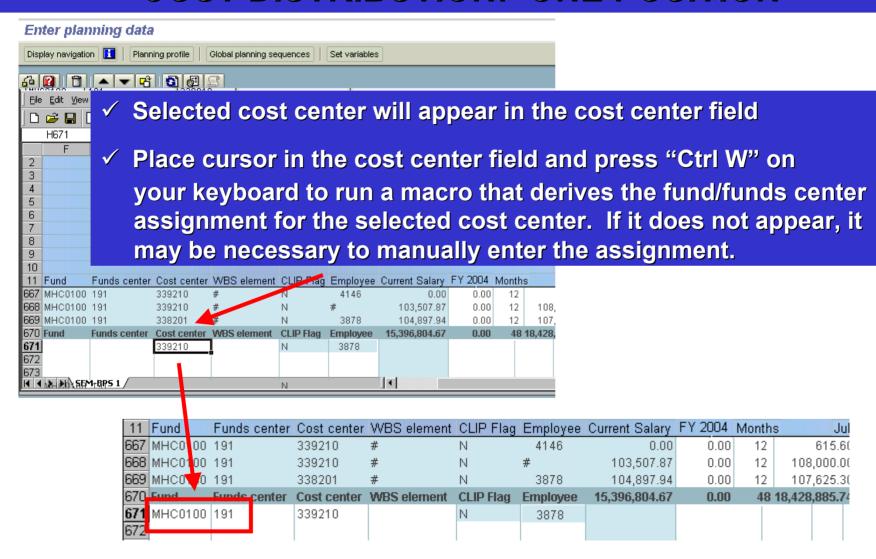






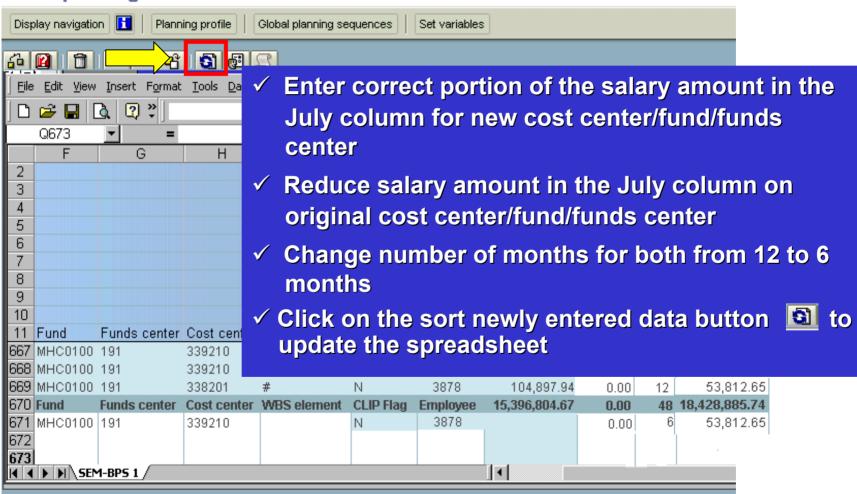




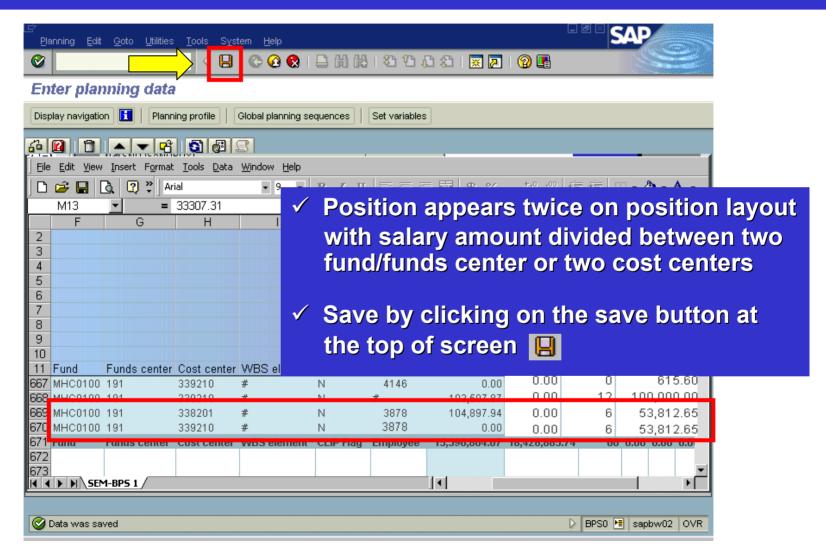




Enter planning data









CASE 6

Remove Cost Distribution: Salary for position currently in two different cost centers/fund/funds center.

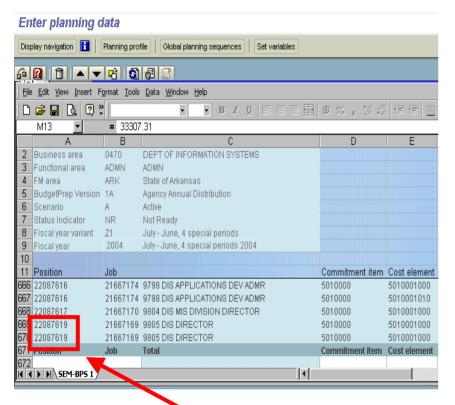


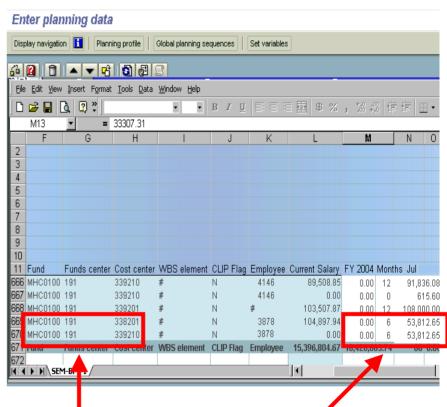
REMOVE COST DISTRIBUTION ON A POSITION

Prior to 1st payroll in FY 04, any changes to position(s) to either add or remove cost distribution will need to be made in HR in R/3 (AASIS) for the change to take effect.



REMOVE COST DISTRIBUTION ON A POSITION

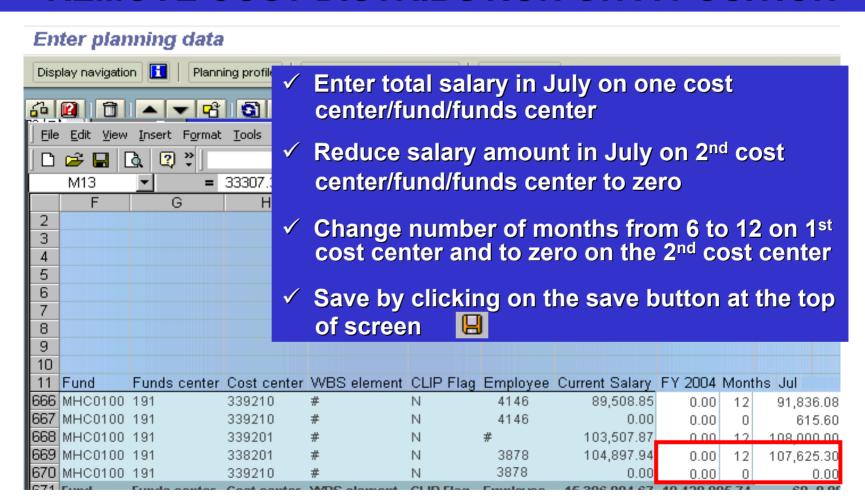




✓ Locate position number to be adjusted (position will appear twice on position layout with salary amount divided between two fund/funds centers or cost centers



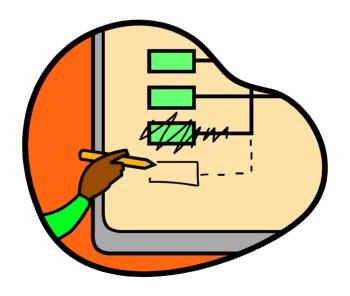
REMOVE COST DISTRIBUTION ON A POSITION





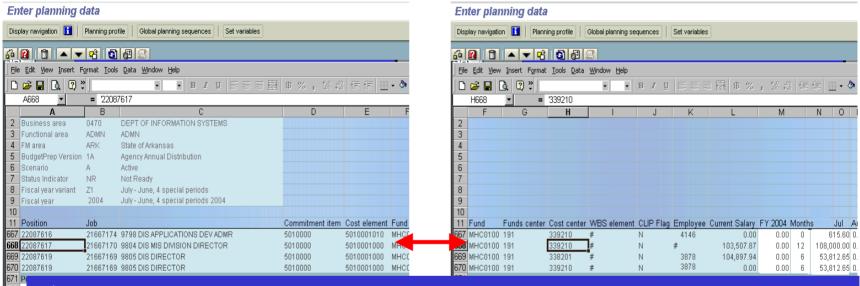
CASE 7

Change cost center on a position.



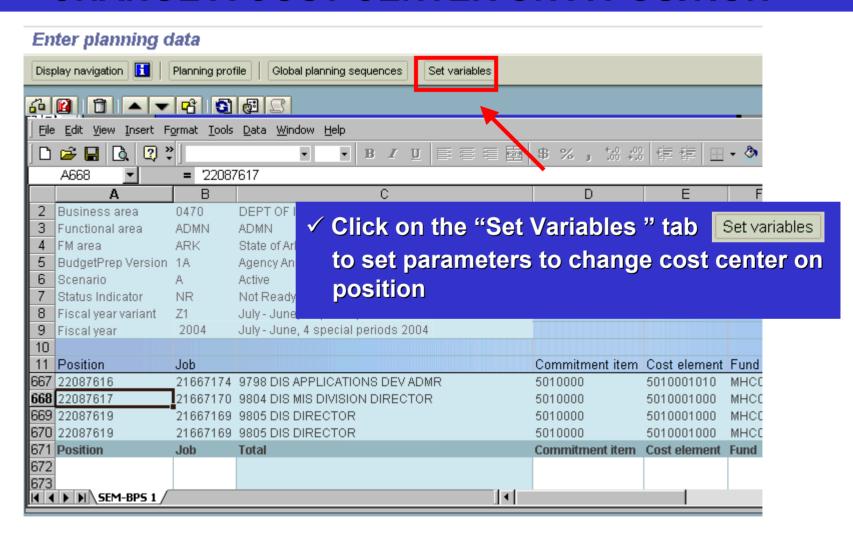
Prior to 1st payroll in FY 04, any changes to a cost center on position(s) will need to be made in HR in R/3 (AASIS) for the change to take effect.

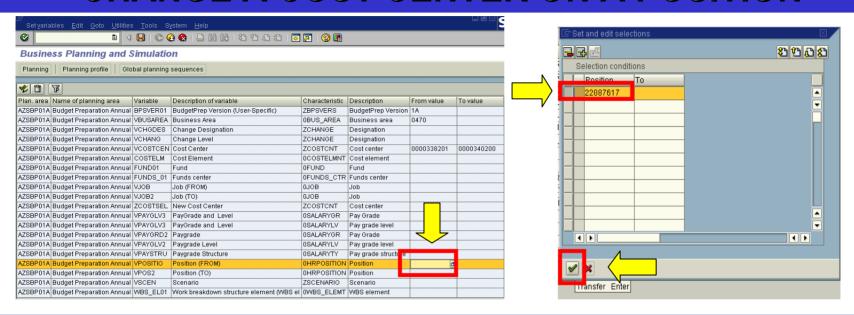




- Determine the position that needs to have the cost center changed
- ✓ Place cursor on position number and press "Ctrl C" on your keyboard to copy position to be placed in variable
- ✓ Click on the "Display Navigation" tab Display navigation to open Navigation Screen

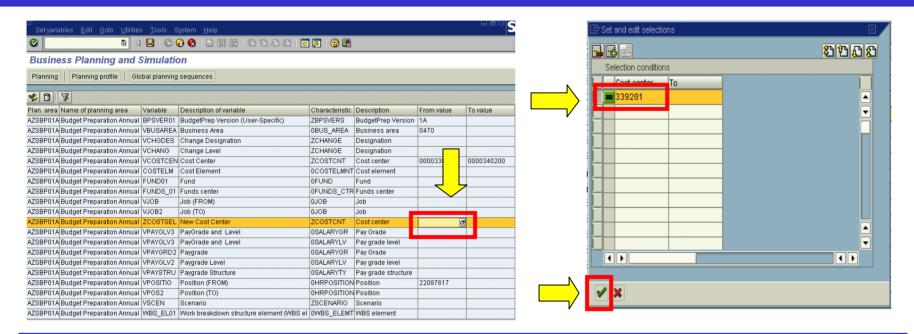




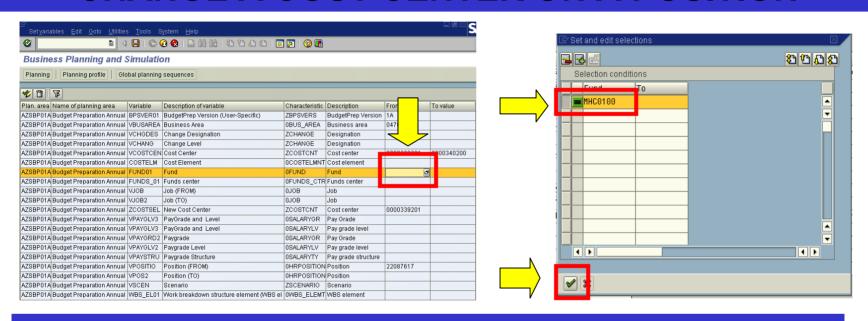


- ✓ Place cursor in Position(FROM) "From Value" cell of variable screen and select drop down menu 🗗 . Selection conditions box will appear.
- ✓ Place cursor in "Position" cell. Press "Ctrl V" to copy position number to drop down menu.
- ✓ Select line on drop down menu (line should be highlighted)
- Click on green check mark



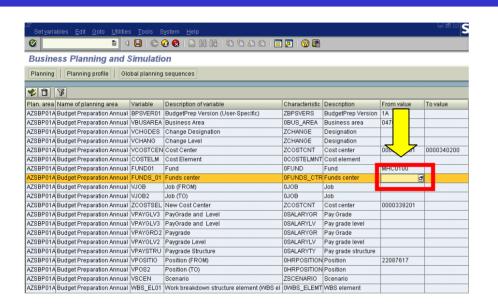


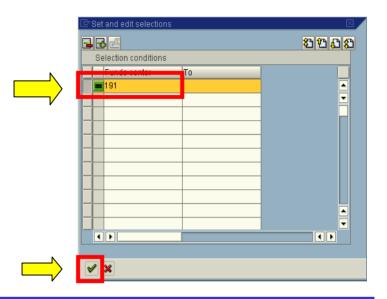
- ✓ Place cursor in New Cost Center "From Value" cell of variable screen and select drop down menu <a>Image: Image: Image:
- ✓ Enter Cost Center the position is to be changed "TO".
- ✓ Select line on drop down menu (line should be highlighted)
- ✓ Click on green check mark
 ✓



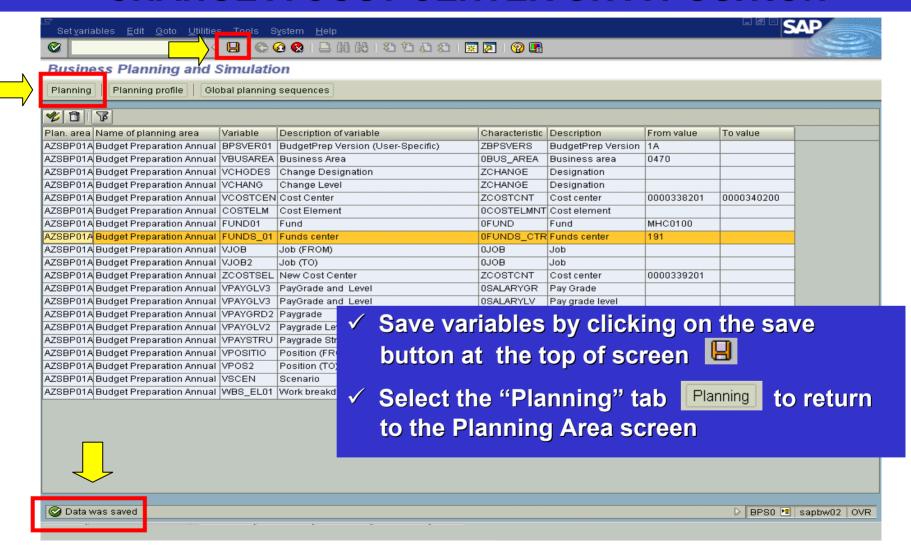
- ✓ Place cursor in Fund "From Value" cell of variable screen and select drop down menu Image: Image: Image
- ✓ Enter the Fund assignment for the cost center the position is being changed "TO"
- ✓ Select line on drop down menu (line should be highlighted)
- ✓ Click on green check mark



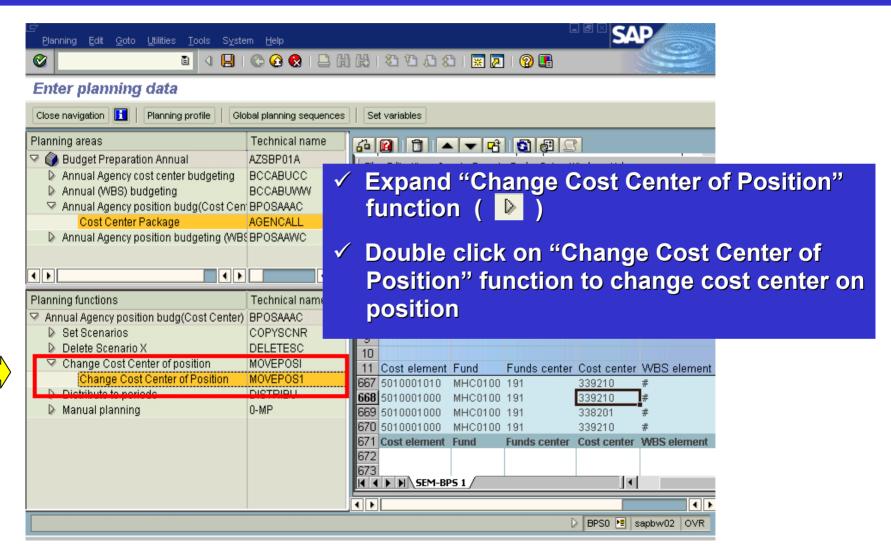




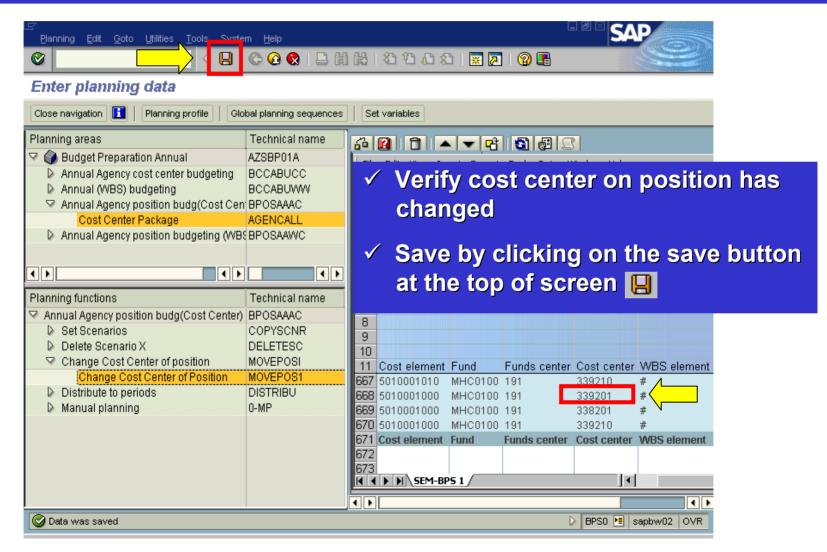
- ✓ Place cursor in Funds center "From Value" cell of variable screen and select drop down menu 🖬 . Selection conditions box will appear.
- ✓ Enter the Funds Center assignment for the cost center the position is being changed "TO".
- ✓ Select line on drop down menu (line should be highlighted)
- 🗸 Click on green check mark 📝







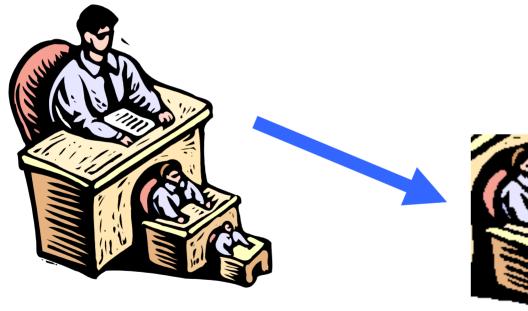






CASE 8

Position budgeting in single or multiple cost centers.

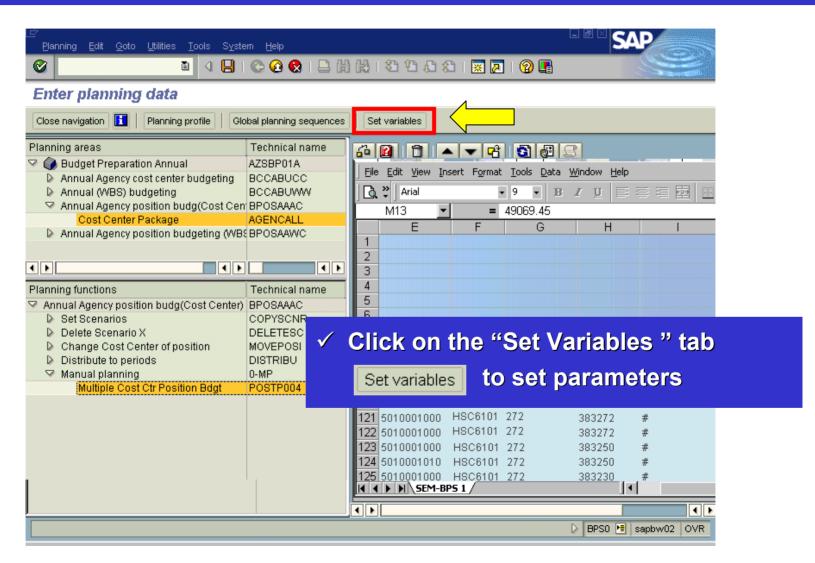




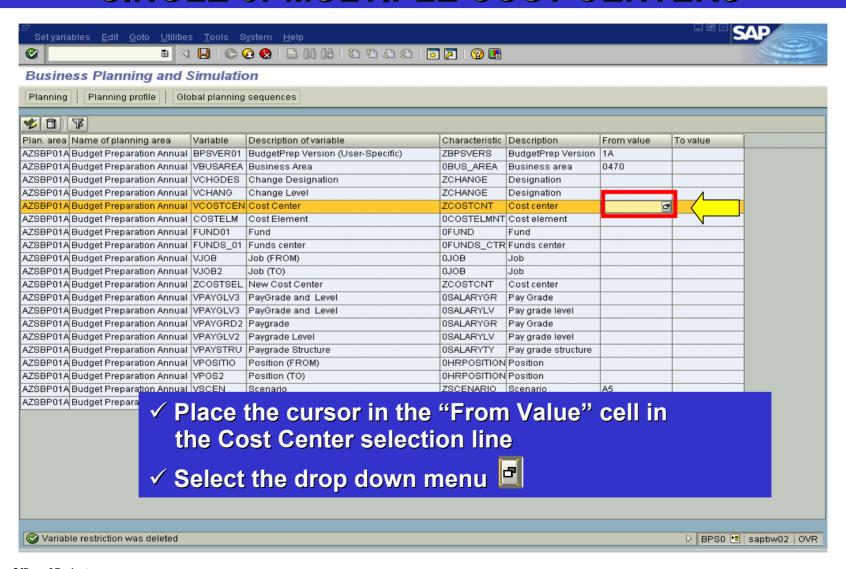


AGENCY IS UPDATING POSITIONS IN ONLY ONE COST CENTER OR MULTIPLE SINGLE VALUE COST CENTERS

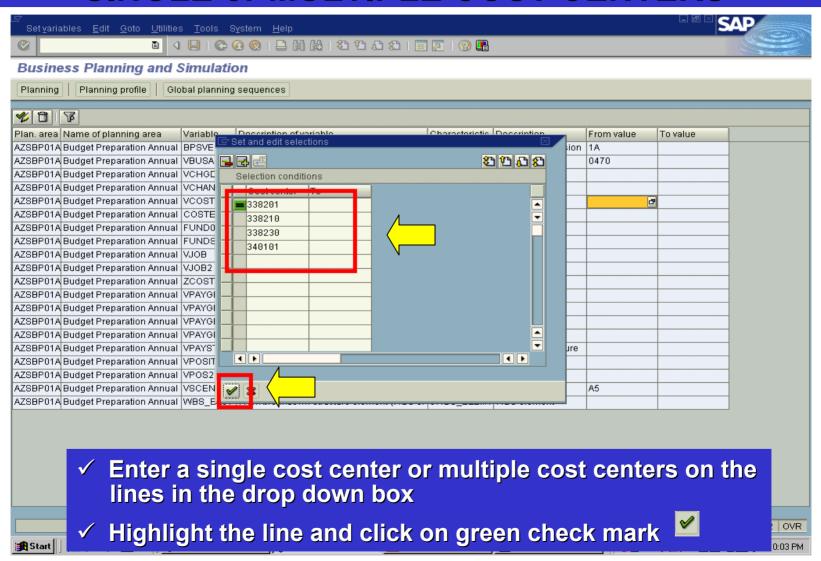




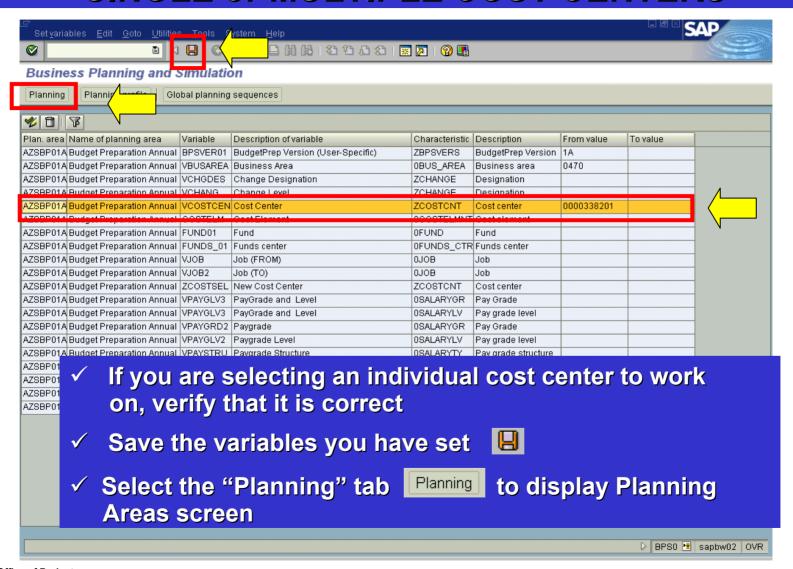




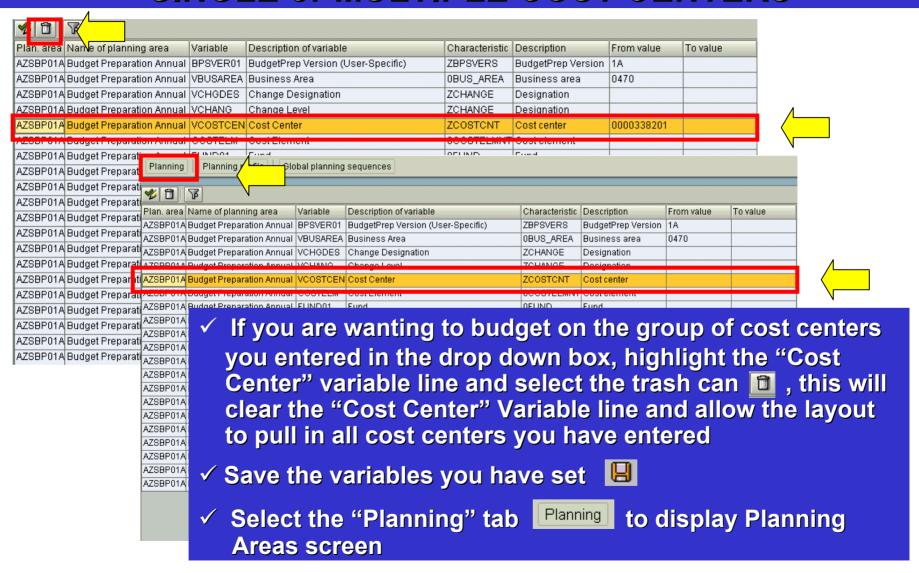




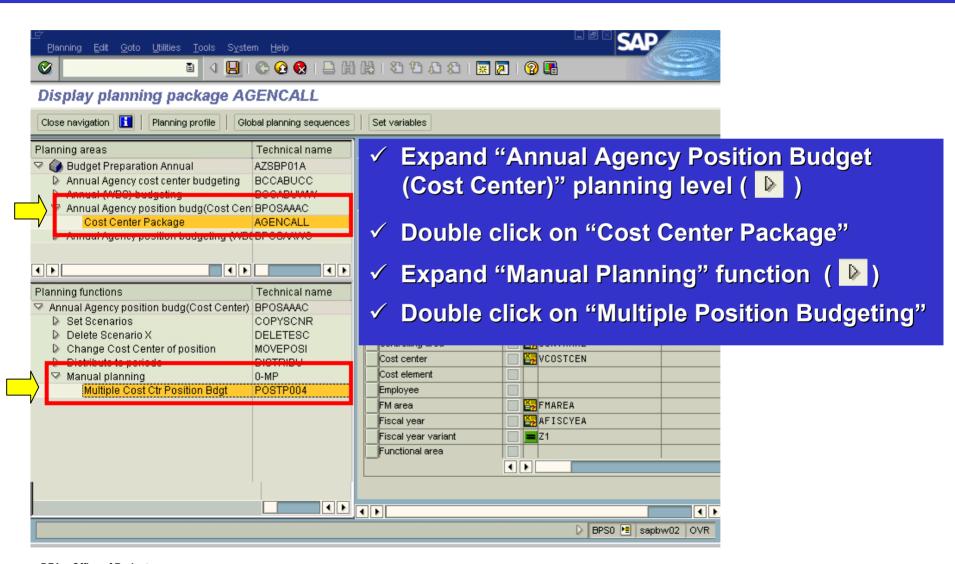




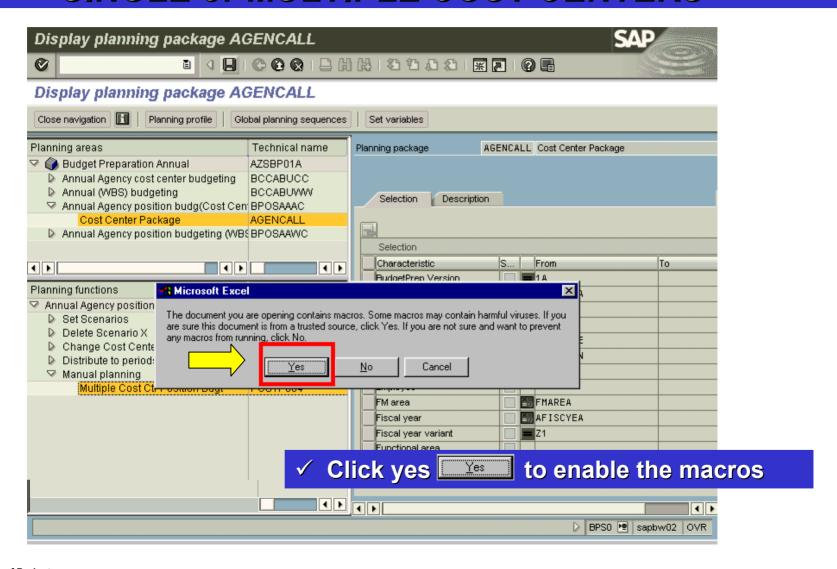




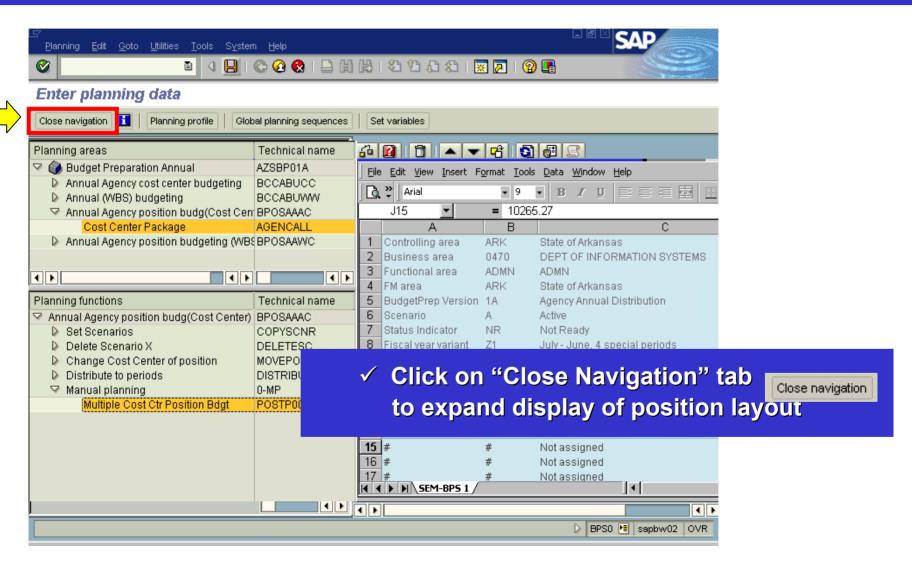




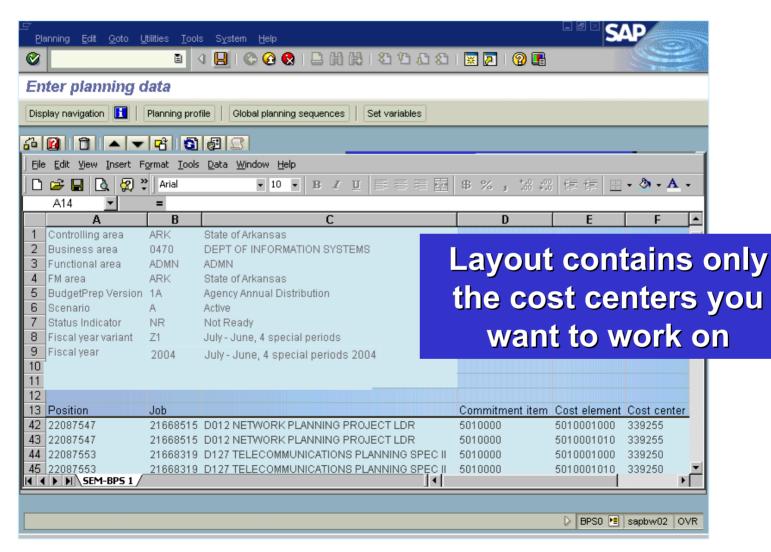








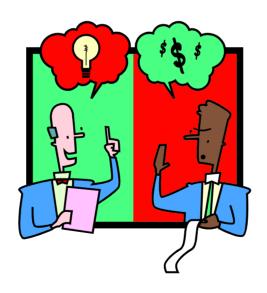






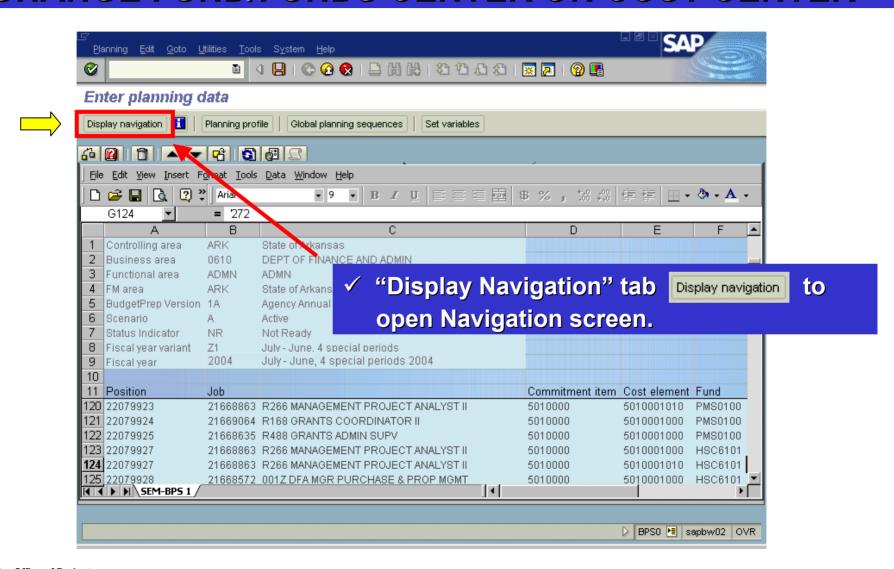
CASE 9

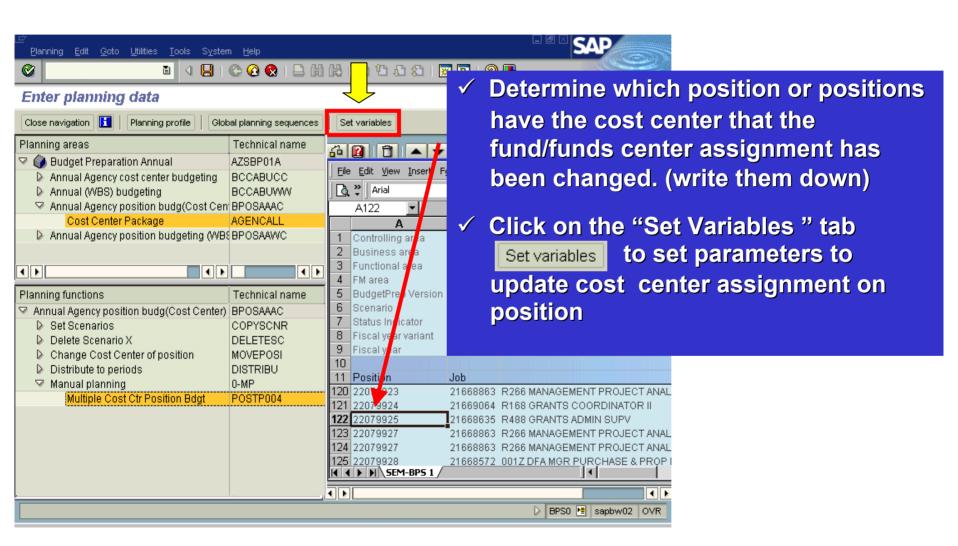
Change Fund/Funds Center assignment on cost center. (DFA function only)



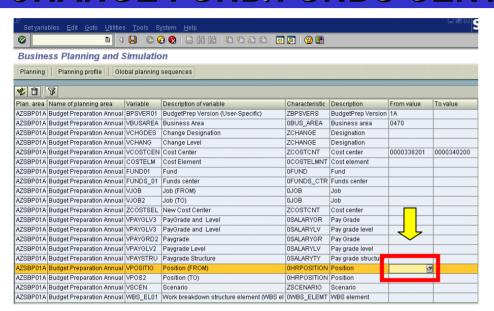
- Agency submits cost center assignment change to DFA – OFFICE OF BUDGET
- Assignment change is made in BPS and agency is notified when update has been made in BPS

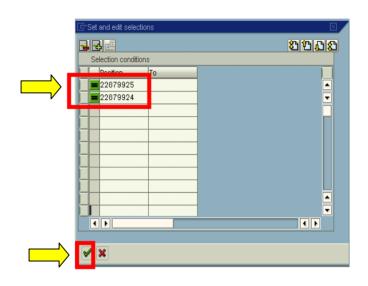






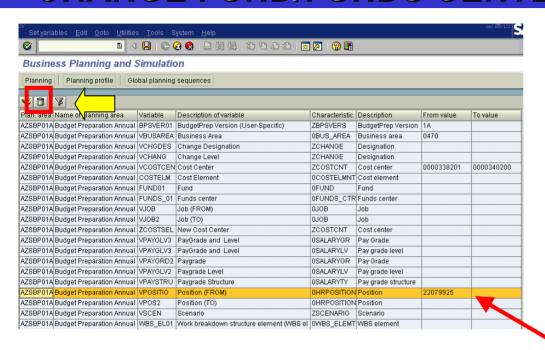






- ✓ Place cursor in Position(FROM) "From Value" cell of variable screen and select drop down menu Selection conditions box will appear.
- ✓ Place cursor in "Position" cell. Key in the position numbers.
- Select line on drop down menu (line should be highlighted)
- Click on green check mark

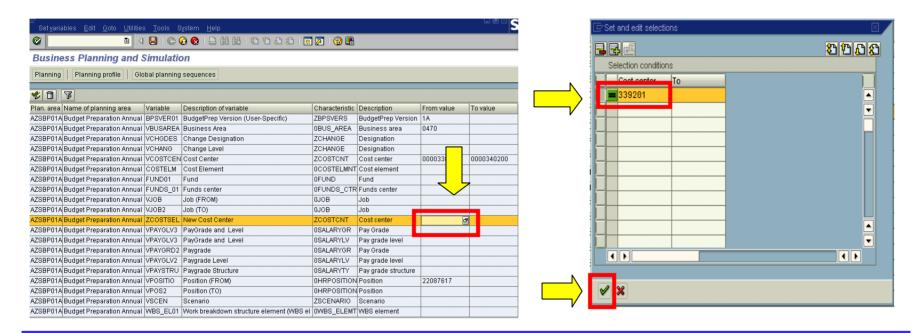




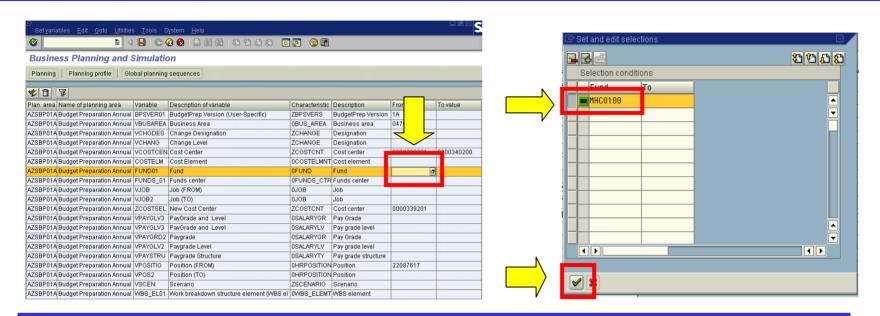
If applying function to more than one position you will need to clear the parameter. This will apply the function to all the positions you listed in the "Selection Conditions" box.

- AZSBP01B | Budget Preparation BPS Big | VPAYSTRU | Paygrade Structure 0SALARYTY Pay grade structure AZSBP01B Budget Preparation BPS Big VPOSITIO Position (FROM) OHRPOSITION Position AZSBP01B | Budget Preparation BPS Big | VPOS2 Position (TO) OHRPOSITION Position AZSBP01B | Budget Preparation BPS Big | VSCEN ZSCENARIO Scenario A5 AZSBP01B |Budget Preparation BPS Big |WBS EL01 |Work breakdown structure element (WBS el | 0WBS ELEMT | WBS element
- ✓ Highlight the "Position (FROM)" line
- ✓ Click on the "trash can"
 - . This will remove the entry in the "From Value"



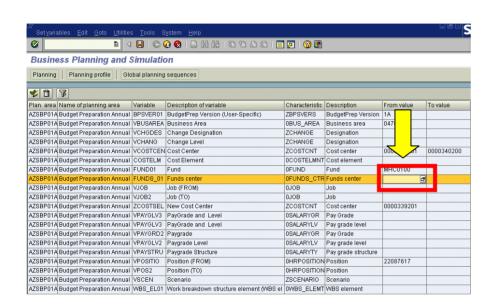


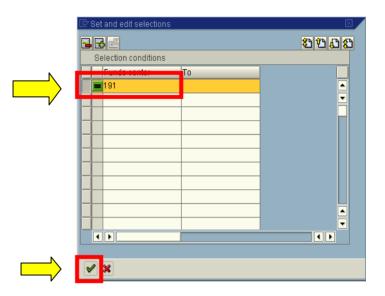
- ✓ Place cursor in New Cost Center "From Value" cell of variable screen and select drop down menu <a>III<a>III<a>III<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII<a>IIII</
- ✓ Enter Cost Center the position is to be changed "TO".
- ✓ Select line on drop down menu (line should be highlighted)
- ✓ Click on green check mark
 ✓



- ✓ Place cursor in Fund "From Value" cell of variable screen and select drop down menu Image: Image: Image of the condition of
- ✓ Enter the Fund assignment for the cost center the position is being changed "TO"
- ✓ Select line on drop down menu (line should be highlighted)
- ✓ Click on green check mark







- ✓ Place cursor in Funds center "From Value" cell of variable screen and select drop down menu Image: Image: Imag
- ✓ Enter the Funds Center assignment for the cost center the position is being changed "TO".
- ✓ Select line on drop down menu (line should be highlighted)
- 🗸 Click on green check mark 📝



